Scheduling
Training Guide

Health PEI
CLINICAL INFORMATION SYSTEMS
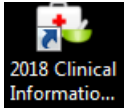
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Logging into Cerner Application

1. For users with single sign-on: Click on the "2018 Cerner App" on your desktop. If you encounter any problems, call the Help Desk at 620-3600.

2. This is the window you will see. This screen will auto-populate with your username and password. "Click Log In".
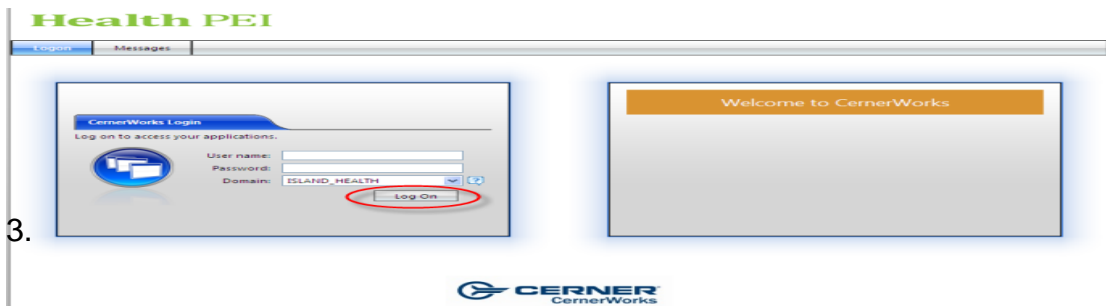
3.

3. The user will then have to input their ISLAND_HEALTH domain username and password in the appropriate fields and click Log In.

They will then see the appropriate folder icons for the solutions they have access to.
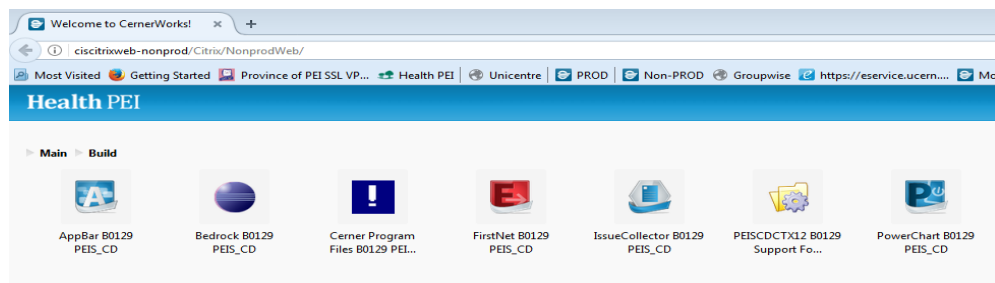
4. Now Double Click on the shortcut for the appropriate Cerner solution you will be working on.
   (Double-click on the App Bar)

Scheduling Icons

Scheduling Icons will assist in performing some of the scheduling actions.

Button	Action
	Appointment View - Opens the Appointment View dialog box so you can view details associated with the appointment.
	Appointment History View - Opens the Appointment History View dialog box so you can view details associated with the appointment.
	Appointment Inquiry - Opens the Schedule Inquiry window so you can launch a person, resource, or location inquiry.
	Request List Inquiry - Opens the Request List tab of the Schedule Inquiry window so you can launch a request list inquiry.
	Appointment Report - Opens the Schedule Report window so you can print person, resource, or location schedule reports.
	View Lock Status - Opens the Locks Held By dialog box to display pending appointment information, which is locked in the system by you.
	Decrease column width
	Increase column width
	Decrease slot size
	Increase slot size
	Zoom in
	Zoom out
	Person Management - Opens the Person Management application to search for a person in the database or to add a person to the database.
	Charge Review - Opens the CS Charge Viewer window, from which you can view or add charges that have been submitted for the person.
	PM Launch - Opens the PMLaunch application. Select the conversation you want to launch from the list in the Available Conversations dialog box.
	Show Allergies - Opens the Allergies dialog box, in which you can view, add, or modify allergies for a person.

Button	Action
	Check In - Checks in the person scheduled for the appointment. When this option is selected, the Check In dialog box opens.
	Check Out - Checks out the person scheduled for the appointment. When this option is selected, the Check Out dialog box opens.
	Verify - Launches an inquiry on insurance coverage for the person scheduled for the appointment to verify eligibility of the medical service to be provided. When this option is selected, the Verify dialog box opens.
	Lock - Locks the appointment so others cannot perform actions on it.
	Unlock - Unlocks the appointment so others can perform actions on it.
	Shuffle - Opens the Appointment Shuffle Criteria dialog box so you can shuffle scheduled appointments.
	Refresh - Updates the displayed information to reflect changes in the database.
	Exit - Closes the Appointment Book.
	Confirm - Opens the Confirm dialog box so you can confirm the appointment.
	Contact - Records the date and time of any contact made with the person scheduled for the appointment, as well as allowing you a place to enter any applicable comments concerning the contact. For example, if you call the person to remind them of the upcoming appointment, you could document the contact in the Contact dialog box.
	Modify - Opens the Modify dialog box so you can modify the details associated with the appointment type.
	Reschedule - Reschedules the appointment. When this option is chosen, the selected appointment is moved to the Work In-Progress box so it can be rescheduled to the appropriate time and resource.
	Hold - Changes the status of the appointment to hold.
	Cancel - Cancels the appointment. When this option is selected, the Cancel dialog box opens so you can enter the reason the appointment was canceled.

Button	Action
	No-show - Indicates that the person scheduled for the appointment did not arrive. When this option is selected, the No-show dialog box opens so you can change the status of the appointment to "no show".

Appbar Customization

If you are unsure of whose appbar is in use, place the cursor over the ![A+ icon] icon. Doing so reveals the Appbar's Username.

1.Right-click on the Appbar to reveal options. The following menu appears:

- **Suspend**: When you step away from the terminal for a period of time and do not want another user to open applications during your absence
- **Change User:** If the previous user has left and you want to log in under your own Username select this option
- **Auto Hide:** Selecting this option "hides" the Appbar when it is not actively used. Moving the cursor to the area of the screen where the Appbar resides will reveal the Appbar again. To "undo" this option, right-click on the Appbar and re-select the Auto Hide option
- **Always on Top:** Selecting this option causes any other application open to not cover the Appbar. Attempts to "Maximize" application screens will maximize around the Appbar, not cover it. To "undo" this option, right-click on the Appbar and re-select the Always on Top option
- **Allow Floating:** (I WOULD USE THIS ONE) Selecting this option allows you to move the Appbar to various locations on the screen. To "undo" this option, right-click on the Appbar and re-select the Allow Floating option. This "locks" the Appbar into one place on the screen.
- **Large Buttons:** Selecting this option increases the size of the icons on the Appbar. To "undo" this option, right-click on the Appbar and re-select the Large Buttons option.

2. Clicking on the **[A]** icon reveals more options, some of which are repeated from the steps mentioned above. The following menu appears:

```
S̲uspend
C̲hange User...
C̲hange Password...
A̲pplications...
C̲ustomize...
Auto Hide
✓ Always On Top
Allow Floating
Large Buttons
H̲elp...
A̲bout Cerner AppBar...
E̲xit
```

- **Change Password:** Should not be used unless otherwise specified. Changing passwords frequently increase the chance of not remembering it!

- **Applications:** Selecting this option allows you to view applications for which you currently have security to access.

   o Double-clicking on the **[A]** icon reveals more information regarding applications you have access to.

   o Double-click on the icon to reveal all applications for which you have access.

   o Double-click on any one of the icons to open that particular application on-demand.

   o When finished, click "Cancel" or click on the "X" button in the upper-right corner of the screen.

- **Customize:** Selecting this option allows the user to choose Launch Bar States previously described in the above steps.

   o Click on the **Buttons** tab. This tab allows you to add/remove icons from your Appbar by clicking on the open box next to the application name.

   o Once you select the desired applications, you can arrange those applications in any order using the "Move" arrows.

   o The "Insert Space" option allows you to spatially separate icons on the Appbar according to how you choose to separate them. You can insert as many spaces as desired.

   o When finished, click "OK" to save changes. To exit without saving, click "Cancel."

App Bar

REGSCHCHART.B0129

Scheduling Appt
Book
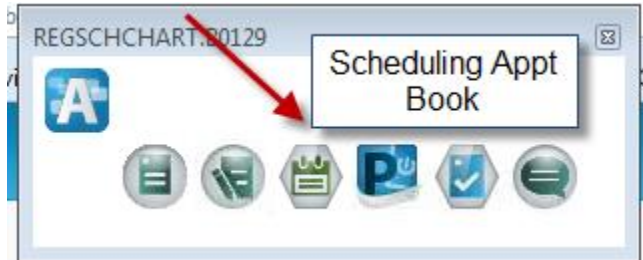
1. Click (single) on the Scheduling Book Appointment Icon
2. Scheduling Book Appointment opens, click on the Appointment tab or Bookshelf tab
   if you are choosing a book.

User Preference Setup

Within the Scheduling Appointment Book solution there are several options which are set at the user level. This means that these options must be completed by every user under their user name. After completing this step one time, the information need not be entered again unless changes are made.

Demographics Bar

1. Click the View option in the tool bar and highlight demographics bar.
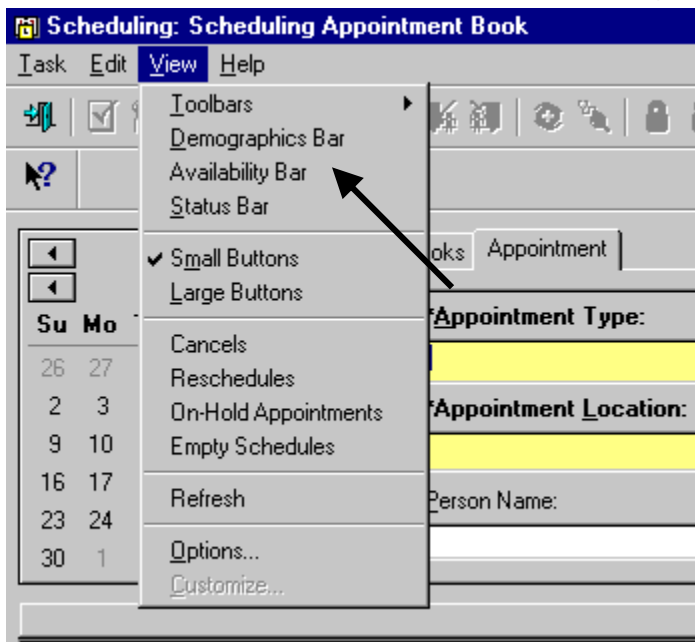
2. By selecting this option the demographics bar will appear and will display patient's name, MRN, age, DOB and gender. You can also Right Click on the demographic bar and properties will appear and you can choose what fields and color you would like the bar to be.
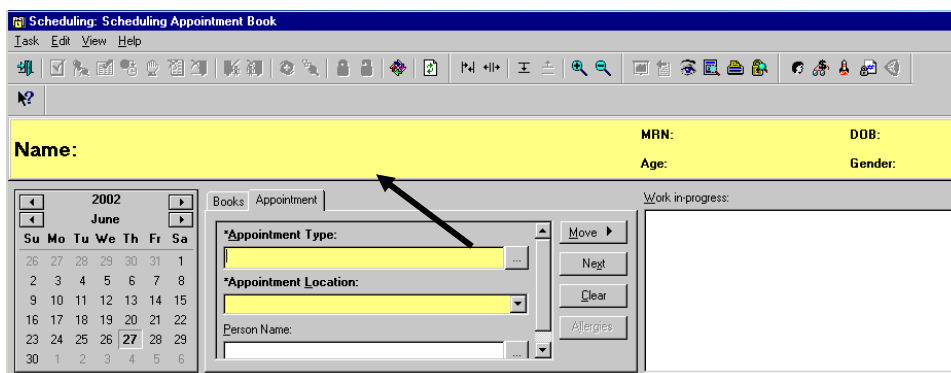
Availability Bar

1. Click the View option in the tool bar and highlight availability bar.
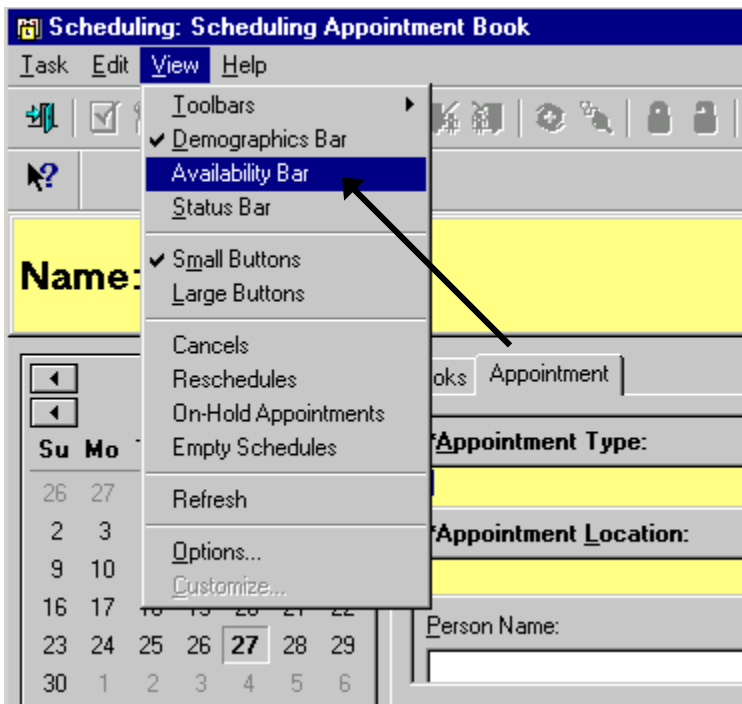
2. The availability bar will show through color coding whether there are resources available for a particular day/week Yellow =available; Black=unavailable.
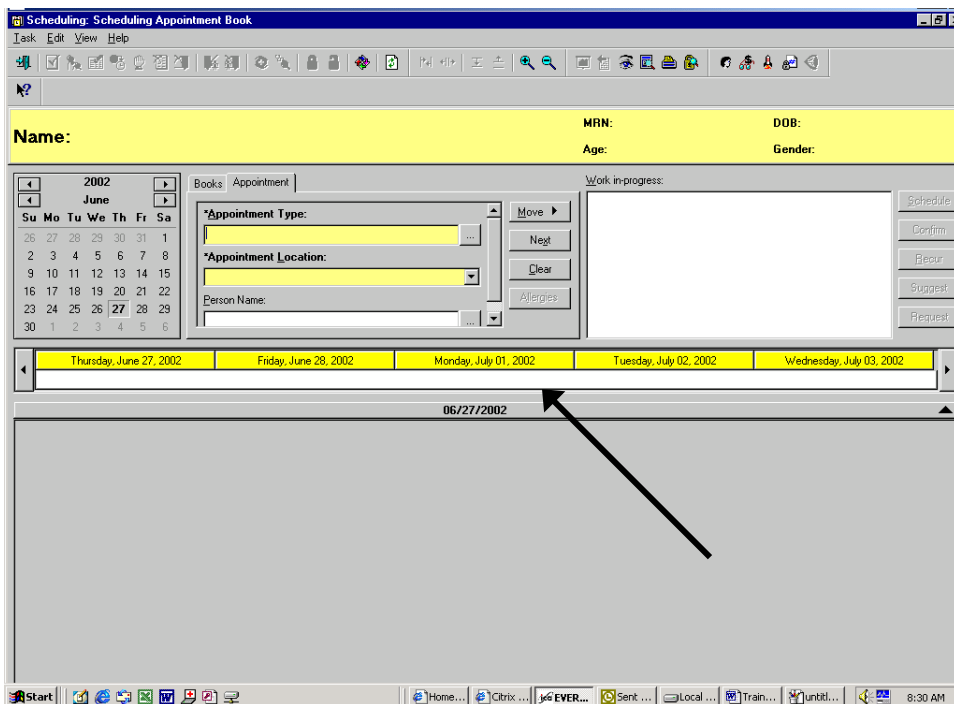
Preference Options

1. Click View in the tool bar and select options.
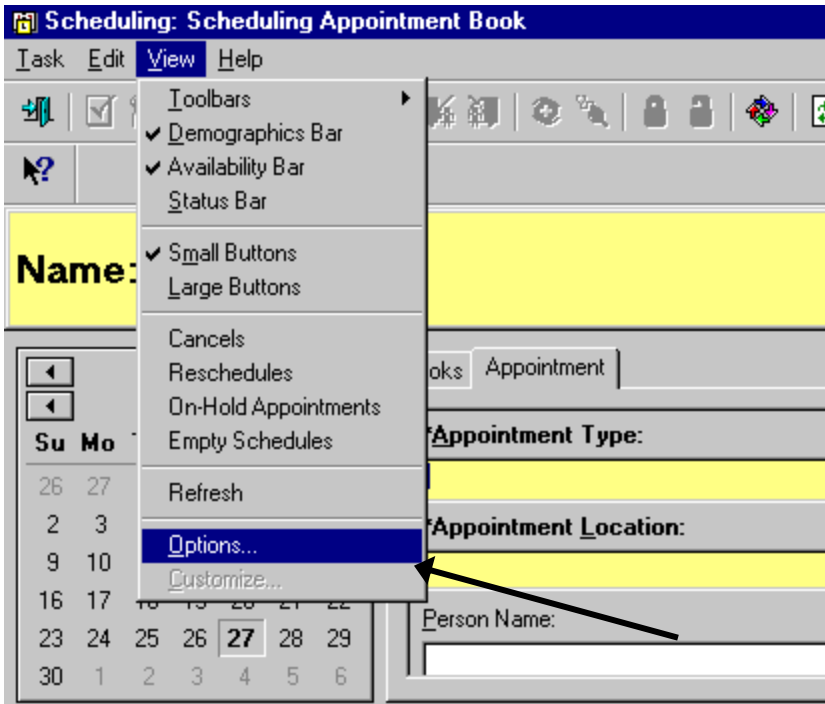
2. This will bring up a series of tabs that will be reviewed one at a time.

User Defaults

1. **Default Location** can be chosen from the drop down menu. This function would be used if a user schedules consistently for one location, i.e. the RAD department.
2. **Default Appointment Type Synonym** can be chosen by selecting the radio button
3. **Appointment Synonym** can be selected from searching in the box for the desired appointment type. This option could be used if a user consistently schedules one appointment type and would then default into the appointment type field.
4. **Appointment scheduling range** refers to the time frame that the system will allow the user to schedule. By setting at 0 and 0, there is no restriction.
5. **Appointment Detail Fields** are the 3 set fields that will always appear at the top of the appointment tab. This option allows you to determine what order these will appear in. For example, if you select the Appointment Location first, only the Appointment Types that can be scheduled for that location are listed for selection.
6. **Work in-progress, Expand the Tree** will determine the levels that are displayed in the Work In-progress window. Default is Role.
7. **Allow multiple Appointment Location Values** will allow multiple location values in one booking conversation. This also allows for the Suggest option to return all available appointments across multiple locations.
8. **Request List Update time** is set here in seconds and will determine the amount of time between updates of the queue.

Appointment Tab

1. **Mark qualifying days** on calendar: When selected this will result in days on the calendar that are open for an appointment to be scheduled to be bolded.

2. **Health plan check**: Checks to determine whether a patient has a health plan, does not specify what health plan it is.

3. **Display future requests/appointments**: If checked this will populate a box that displays the future appointments for a patient.

4. **Display Extended Conflict Details box**   If checked the Conflicts dialog box should be opened when booking conflicts occur to expand the ability to resolve conflicts. If not selected, the Booking Conflicts dialog box is displayed.

5. **Maintain Focus on Pending Appointment** If checked this option will return focus to the pending appointment, once you select a resource or role in the Work in Progress box, after you have moved away from the pending appointment. In the absence of a pending appointment the focus returns to the previously confirmed appointment.

6. **Display person search encounter window**: If checked, this will bring up the encounters that a person has when a person search is done.

7. **Always display PM Organization dialog when adding an encounter**: If checked this will bring up a box in which you can select the organization from which to launch a conversation.

8. **Always display Schedule dialog when scheduling into discrete/contiguous**: If checked, this will cause the schedule box to come up and populate if you are scheduling an appointment into a discrete or contiguous slot (depending on which you select).

9. **Flex Form Defaults**: Once this button is selected, a box comes up in which you can select the Flex Forms (PM conversations that you wish to occur when you complete actions of View Person, Modify Person, Add Person, View Encounter, Modify Encounter, Add Encounter, and Cancel Encounter. THIS IS DONE BY THE SYSTEM

Navigation Tab
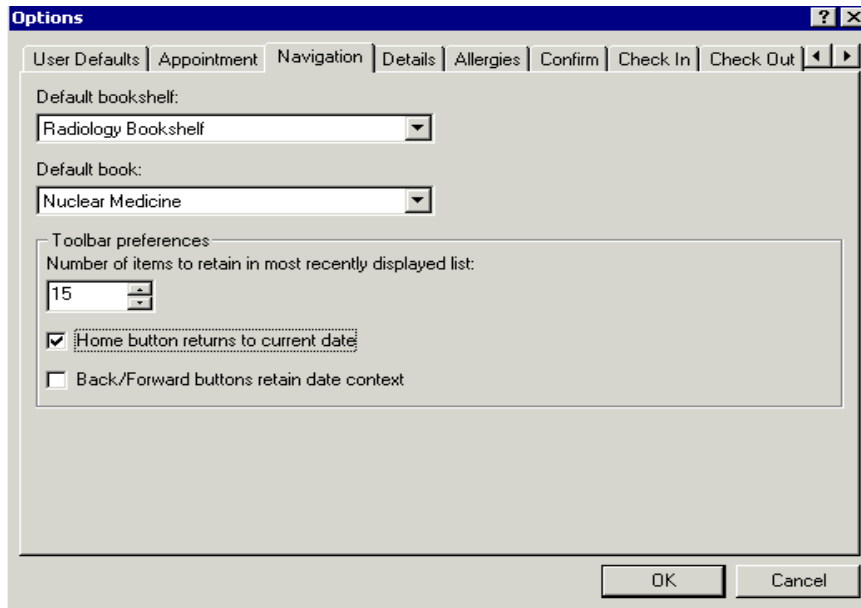
1. **Default Bookshelf list -** Enter the name of the resource bookshelf to be displayed as your default bookshelf. There is a list available to assist you in selecting a predefined bookshelf.
2. **Default Book list -** Enter the name of the resource book to be displayed on the bookshelf as your default book. There is a list available to assist you in selecting a predefined book.
3. **Number of Items to Retain in Most …spin box -** Select the number of items you want to be retained in the Back list.
4. **Back/Forward Buttons Retain Date Context option -** Select this option if you want the Back and Forward toolbar buttons to dates as you navigate with the calendar.
5. **Home Button Returns to Current Date option -** Select this option if you want the Home toolbar button to return you to the current date.

Details
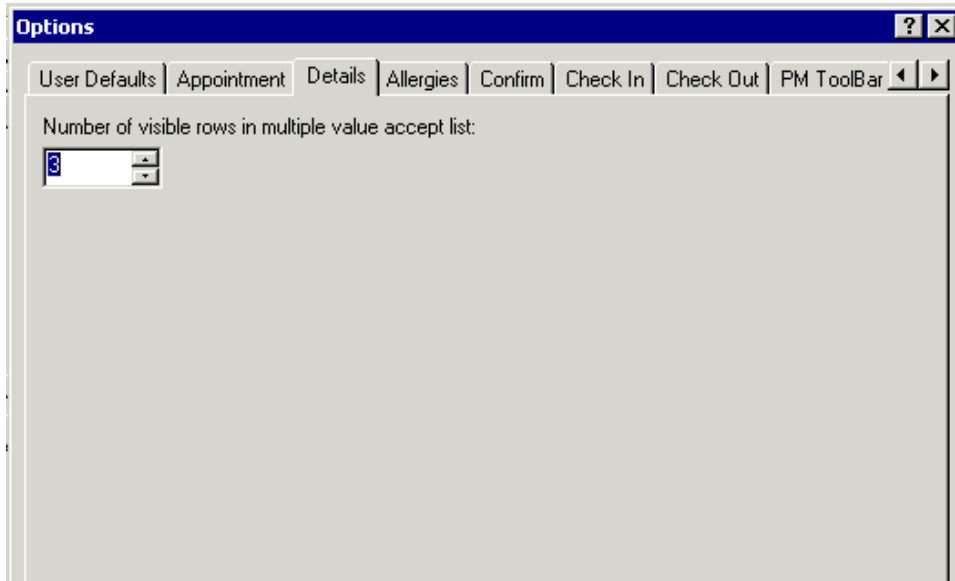
1. **Number of visible rows in multiple value accept list:** If you have a field with multiple selections, this lets you set how many are viewable. The default is three. Please leave at 3.

Allergies
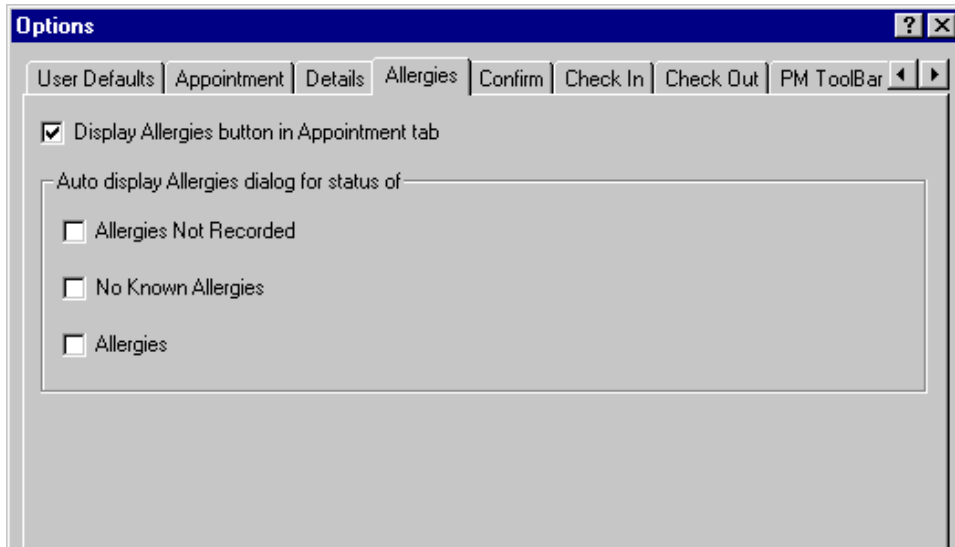
1. **Display Allergies button in Appointment Tab**
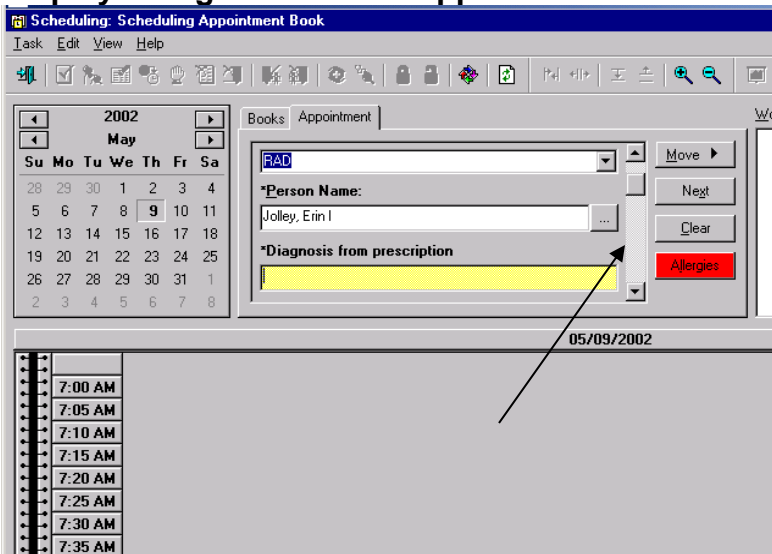
2. If they do not have allergies recorded, the button will be gray with "ANR" on it.
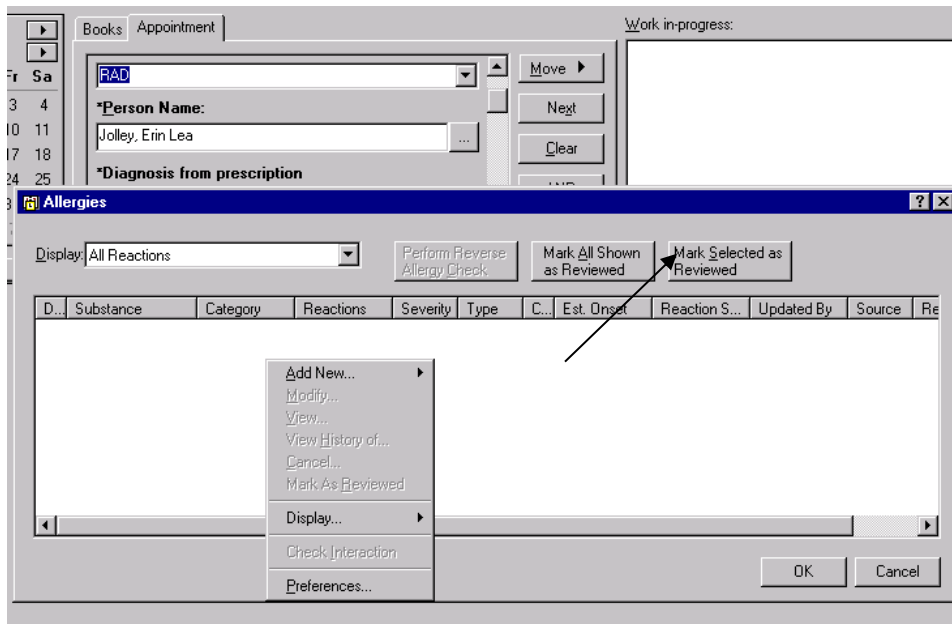
3. By selecting options under **Auto Display Allergies** the allergies box will automatically display if the checked options are met, i.e. if the patient has allergies recorded, allergies not recorded and/or no known allergies.

Confirm
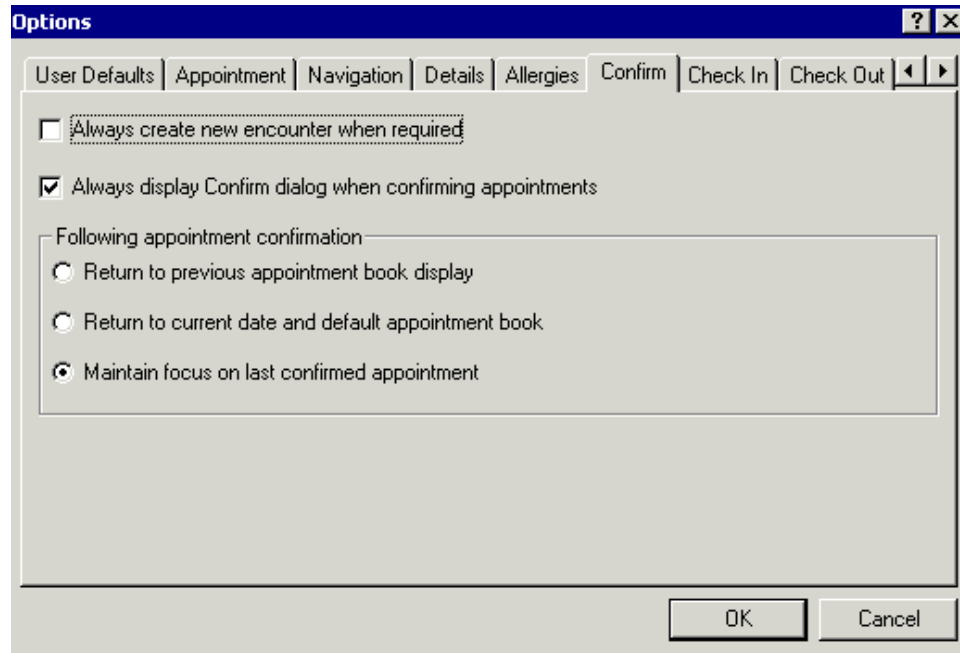
1. **Always create new encounter when required**: This allows you to force an encounter to be created when an appointment is scheduled.
2. **Always display Confirm dialog when confirming appointments**: With this option checked, you can view the confirm box, which displays the preps and appointment information.
3. **Following appointment confirmation**:
    a. **Return to previous appointment book display.** Select this option if you want to return to the previous appointment book after confirmation.
    b. **Return to current date and default appointment book .** Select this option if you want to return to the current date in the Scheduling Appointment Book calendar after confirmation.
    c. **Maintain focus on last confirmed appointment. Select this option if you want to remain on the currently confirmed appointment. This when check gives good information on the appointment. Please check this**

Check In Tab
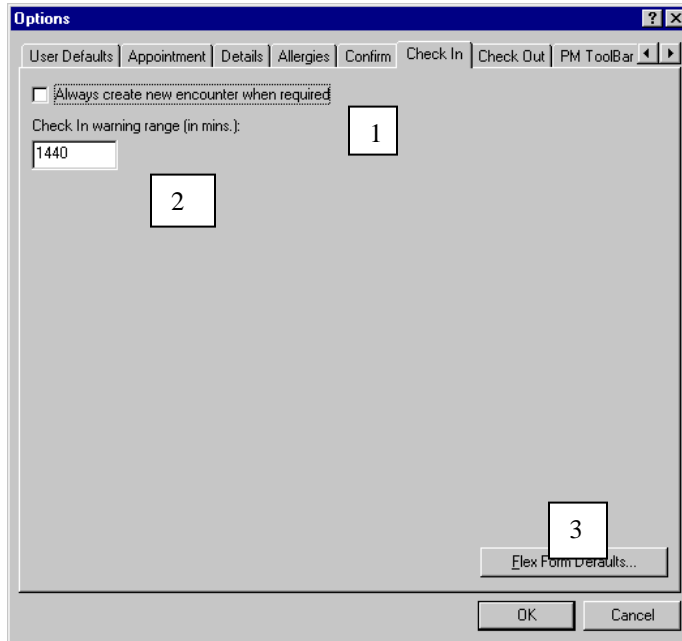
1. **Always create new encounter when required**: By checking this option the scheduler must add an encounter upon check in. DO NOT CHECK
2. **Check in warning range**: This option identifies the time frame that the system will allow you to check in a patient without giving a warning. The system automatically defaults it to 24 hours (1440 min). Cerner recommends this to be set at 1440.

Request Criteria
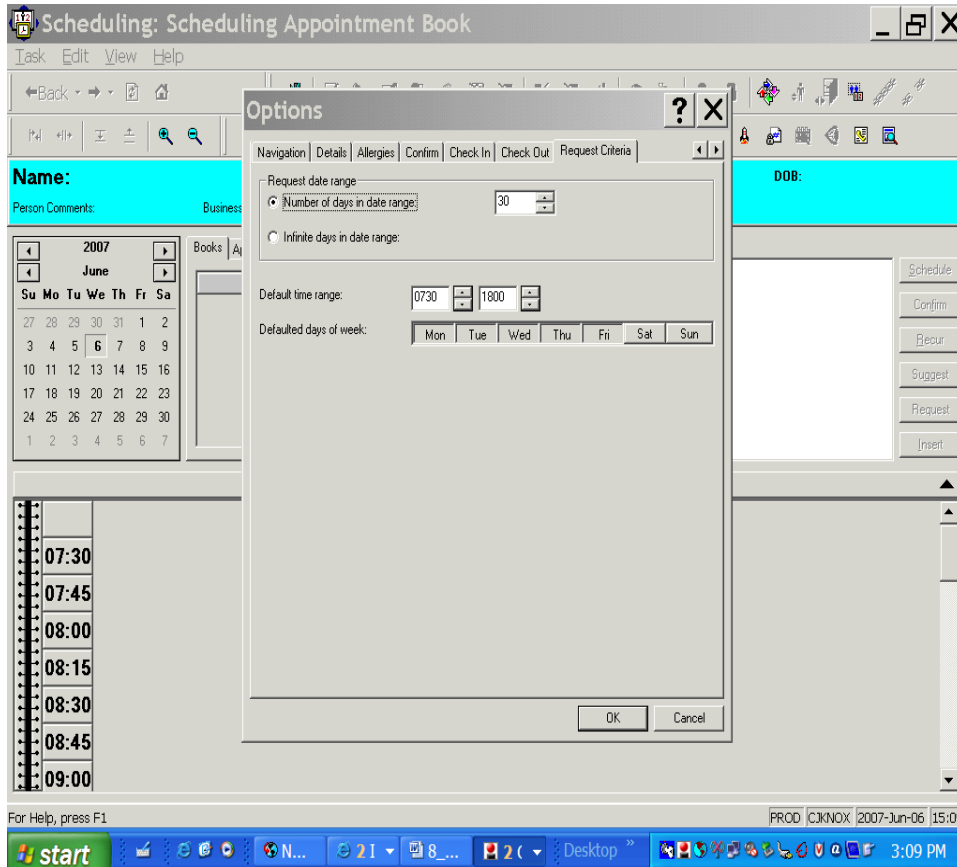
- Set the numbers of day in date range at 30

- Default time range at what time you would like an appt to start for suggest scheduling . Example Endoscopic day starts at 0730 set the time for 0730 to 1500 when the last appointment is scheduled for.

- Default the days of the week for a five day work Monday thru Friday

Book Settings

Book settings determine the view of the appointment book. They can be accessed by right clicking in the appointment book and selecting "Book Settings."

View
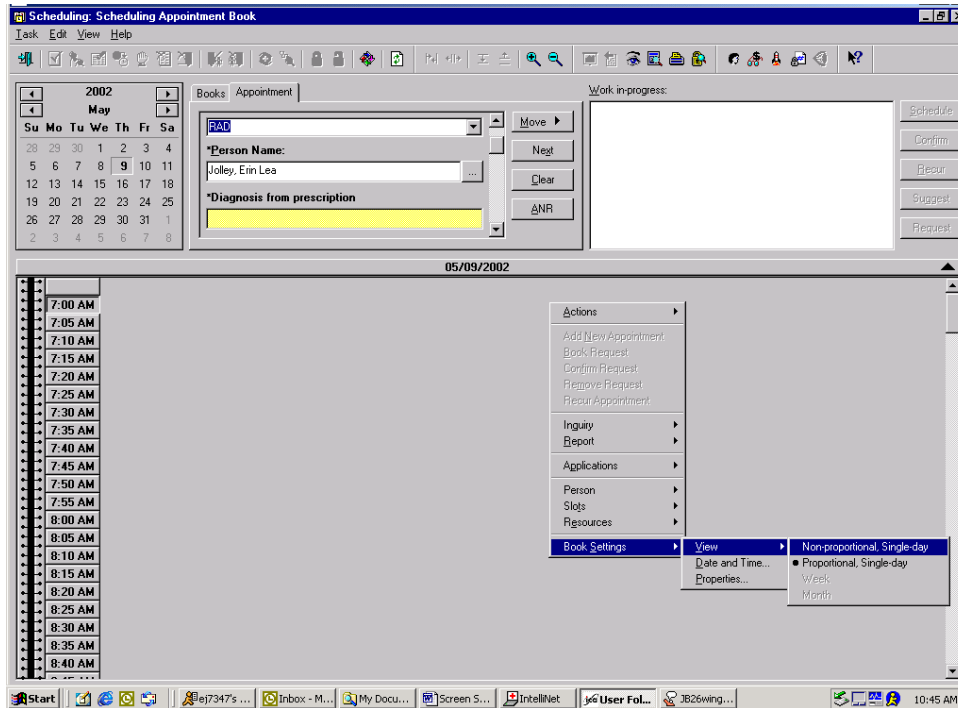
Proportional View: Allow the user to see all of the breaks in the day; the times are at the left hand side of the book.
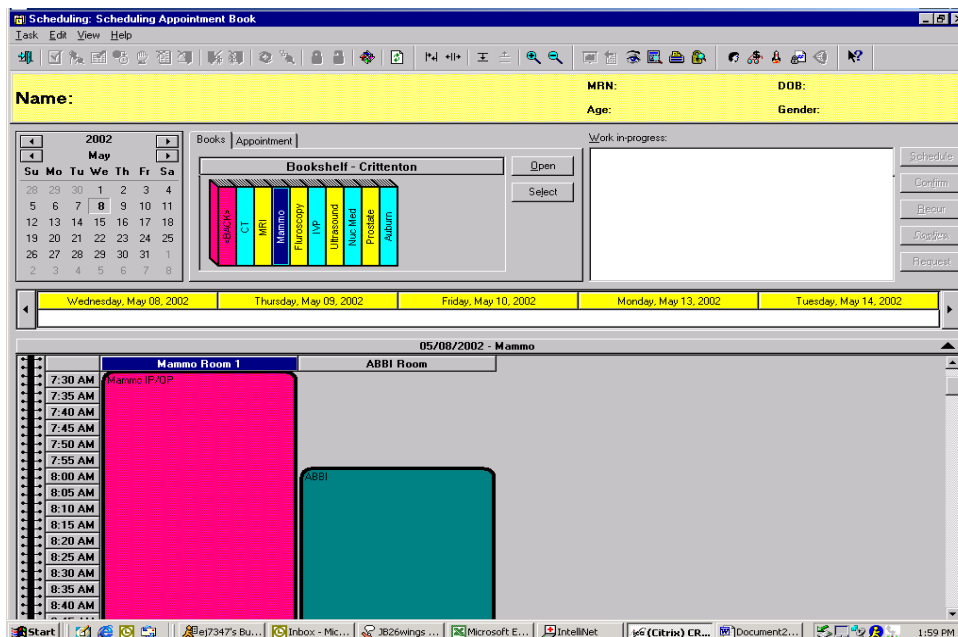
Non-Proportional Single-Day: Appointments line up next to each other regardless of time, view is symmetrical. Times are seen when user clicks on slot.

Book Properties

These are accessed by right clicking on the book, selecting book settings then properties.

General Tab
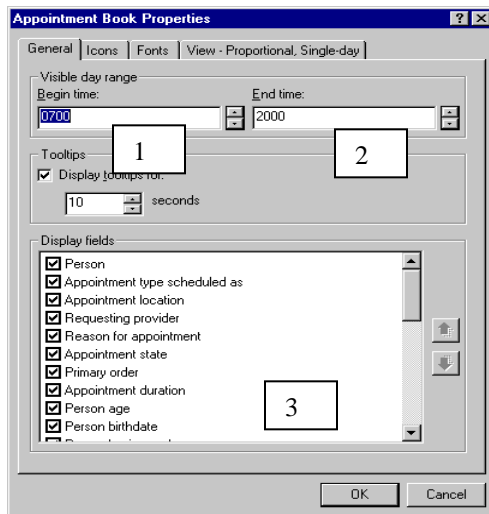
1. **Begin Time**: In military time this determines the time that the appointment book will start, this crosses all books and bookshelves.

2. **End Time**: In military time, this determines the time that the appointment book will end, this crosses all books and bookshelves

NOTE: **If there are any slots beyond the time designated, these will not be visible on the books. However, by using suggest, you can still schedule into them.**

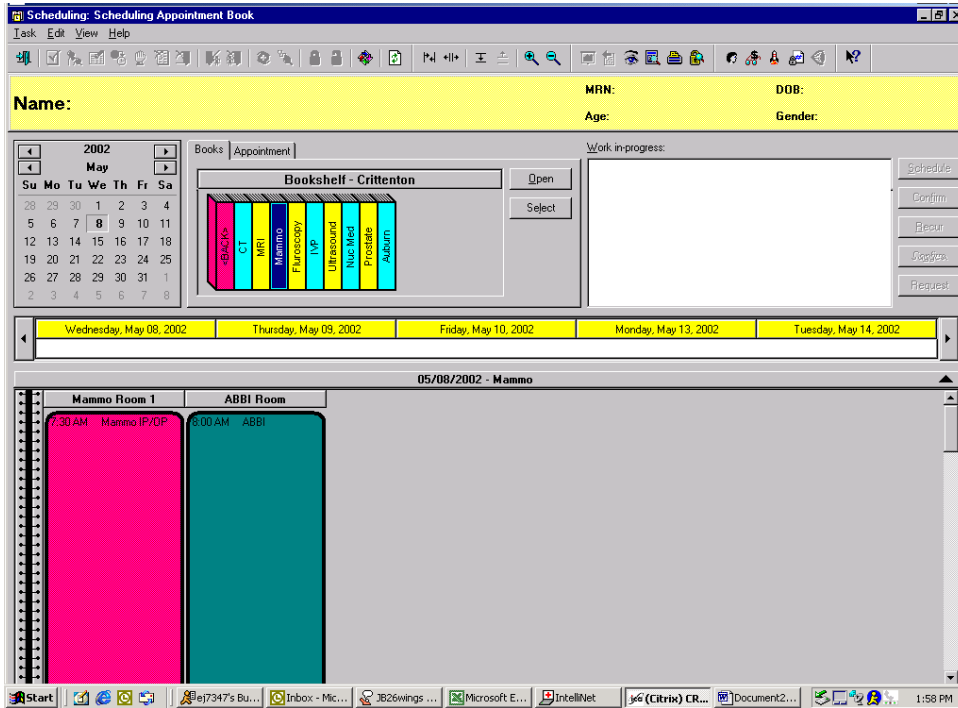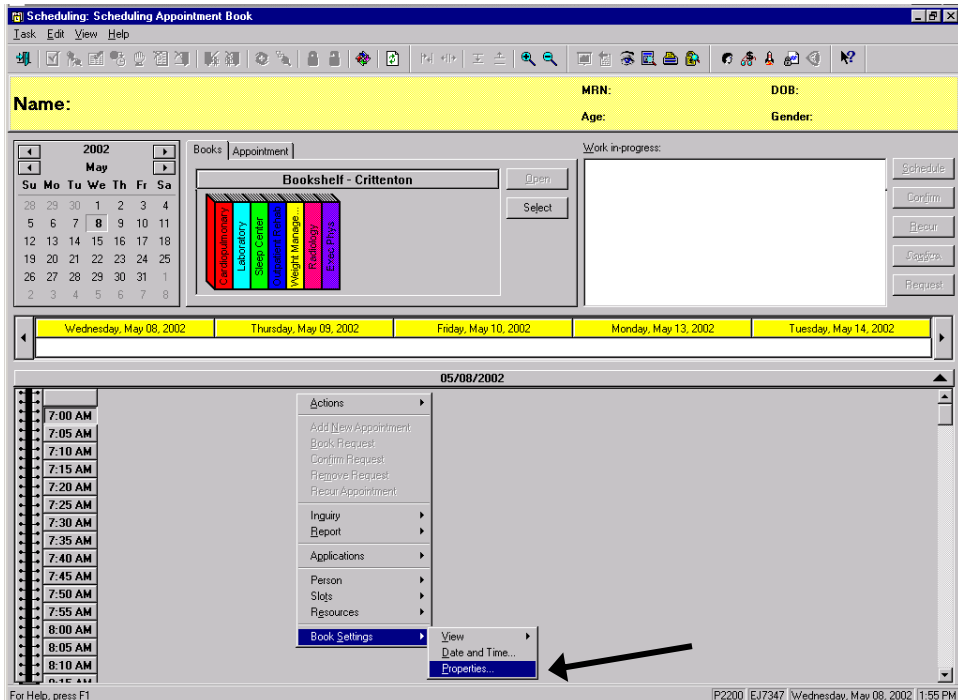3. **Display fields**: These are the fields that will show in a scheduled appointment on the books. By clicking the up or down arrows, you can change the order in which they are displayed.

Icons

By selecting any of the icons listed, a symbol will appear if the criteria is met. Ex. Slot Icon-if Comments is checked a bubble will appear on the slot if comments are entered. Ex. Appointment Icon- if allergies is checked, an icon will appear on the appointment scheduled if the person it is for has allergies.
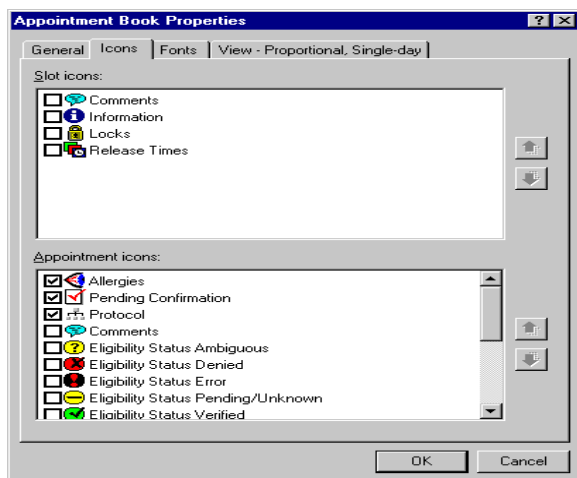
Fonts Tab

Fonts as they appear in the appointment book can be changed using this tab.
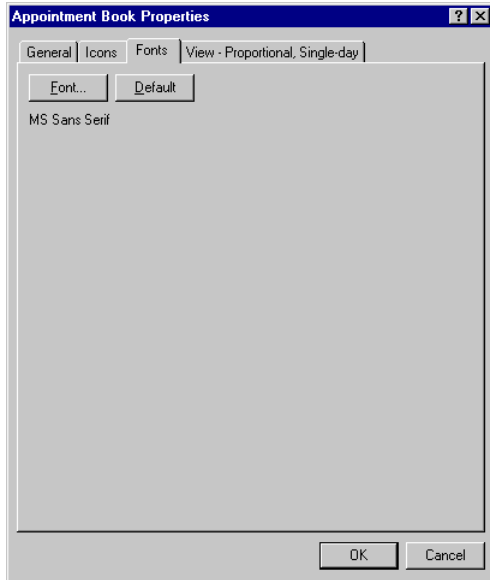
View Non-proportional Single-day

This tab is available if the Non-proportional Single Day view has been selected
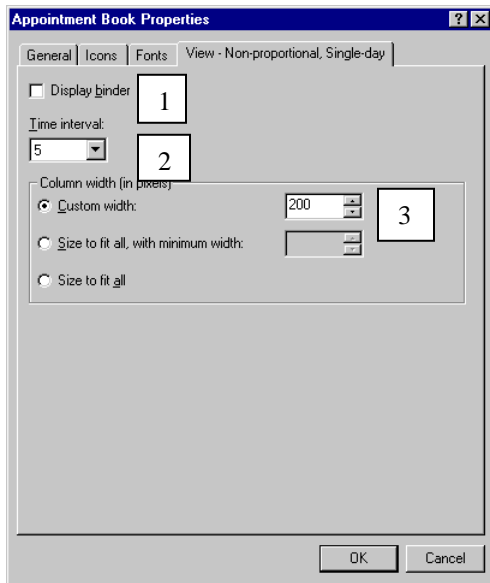
1. **Display binder**: By checking or un-checking this option, the binder on the left side of the appointment book will be visible or not.
2. **Time interval**: This option determines the increments of time in the slots and is shown in minutes.
3. **Custom width**: This option determines the width of the slots under the resources.

View Proportional Single-day
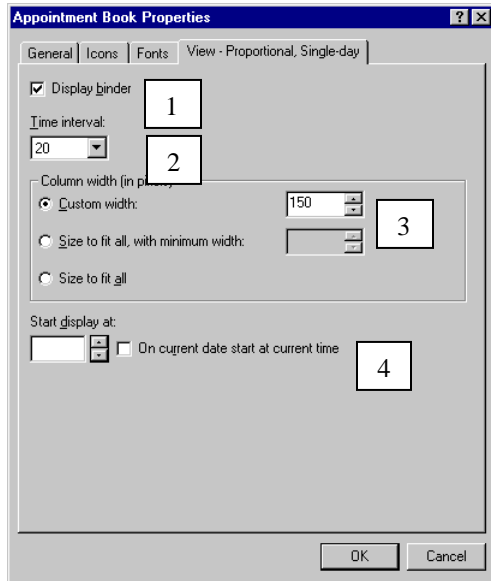
1. Same as View non-proportional single day.
2. Same as View non-proportional single day.
3. Same as View non-proportional single day.
4. You can set the time and day that you wish to display when you first log on to the application.

Appointment Scheduling

There several different methods for scheduling an appointment within the Scheduling Appointment Book application. This section will discuss each of those methods and situations where one method is recommended vs the others.
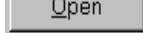
Drag and Drop Method

The drag and drop functionality is a quick and simple method when scheduling single appointments, especially when it is easy to locate available slots with minimal searching.   This method works best when scheduling areas which are not booked out far into the future.

1. Open the Scheduling Appointment Book application (Schapptbook.exe).
2. Click the book you want to open (the book will be highlighted) and then click "OPEN" to open the book. (You may also double click the book to open it.) Or, click on the Bookshelf bar and select a new bookshelf.
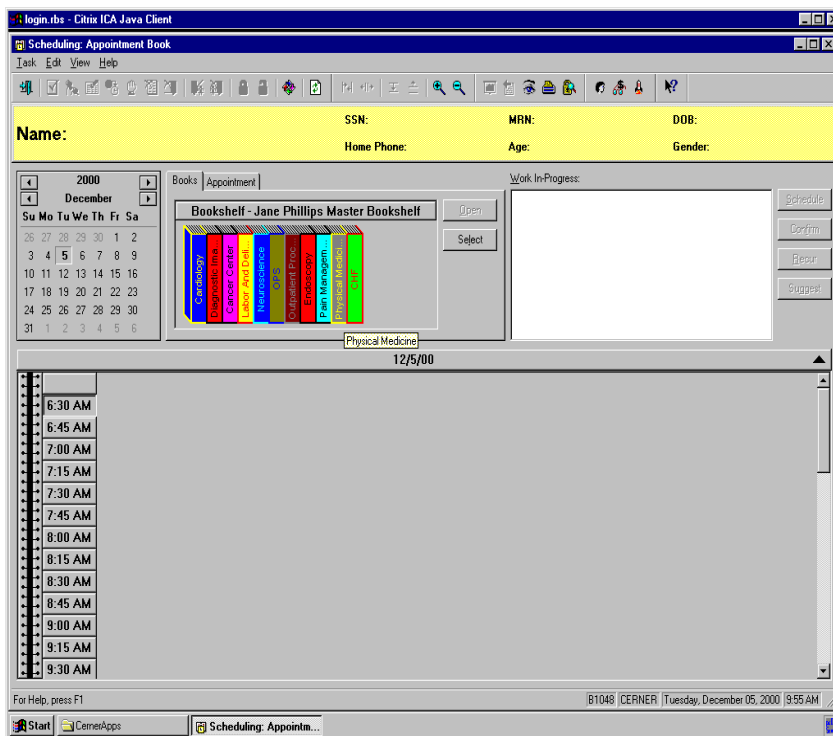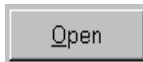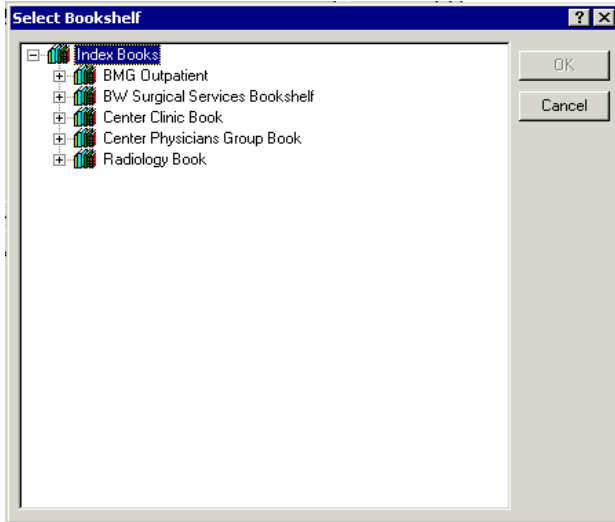
3. Click a specific book and then click [Open] to open the Appointment Book. (You may also double click the Appointment Book to open it.) Please choose a date from the Calendar .

4. You can have the location field or Appt type field first or the Person Name field, this shows us using the person field first , but this is the scheduler's choice and this is done by setting your preference . This can be done by clicking on the view and picking options, under the user default tab and then go to the Appt detail fields which displays the three types and put this in the order of your choosing. The example shown here is with entering the person field first. Enter in the patients last name and first two letters of the first name.
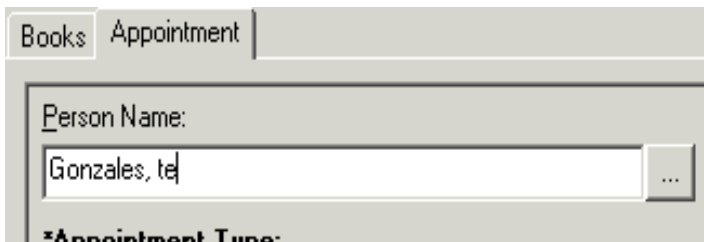
5. Press your Enter key or the ellipses button to search. The Person Search window will display showing all patients whose name matches the patient information you entered. Select the appropriate patient and press the OK button.

Please Note: This is set up with Person filed first in the Accept Format; It is recommended to have Appt. Type first (However it is the schedulers choice.)
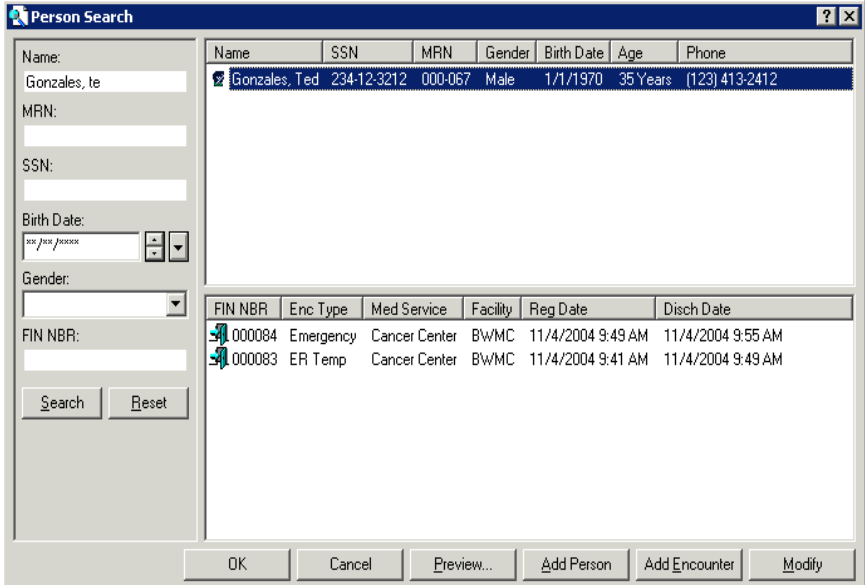
6. The patient's name will now display in the Person Name field. If no person is found Click the " Add Person tab". *(THESE NEXT STEPS ARE FOR ONLY ADDING A NEW PERSON FROM NUMBER 6 THROUGH 25) IF NOT ADDING A NEW PERSON PLEASE GO TO STEP NUMBER 26 AND CONTINUE UNTIL STEP 41 AND THESE WILL COMPLETE THE PROCESS FOR DROP AND DRAGGING AN APPOINTMENT.*
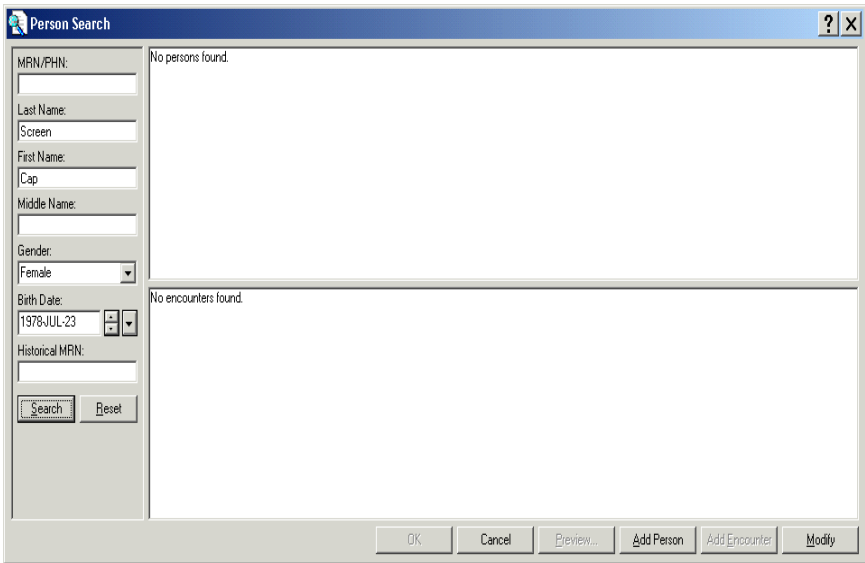
7. If available, enter patients Last and first name, DOB and gender. Click on the Search button.
8. No Persons found will show.
9. Click on the Add Person button

The Add Person screen opens

10. Complete all required fields.
11. After Clicking OK, user returns to the Scheduling screen.
12. Continue the process of scheduling and you will come to the "Add Encounter Screen.

13. Click on the Add ENC Button.

PREADMIT SCREEN OPENS
(Ensure Patient's Last and First Name, DOB and Gender, fields are completed)
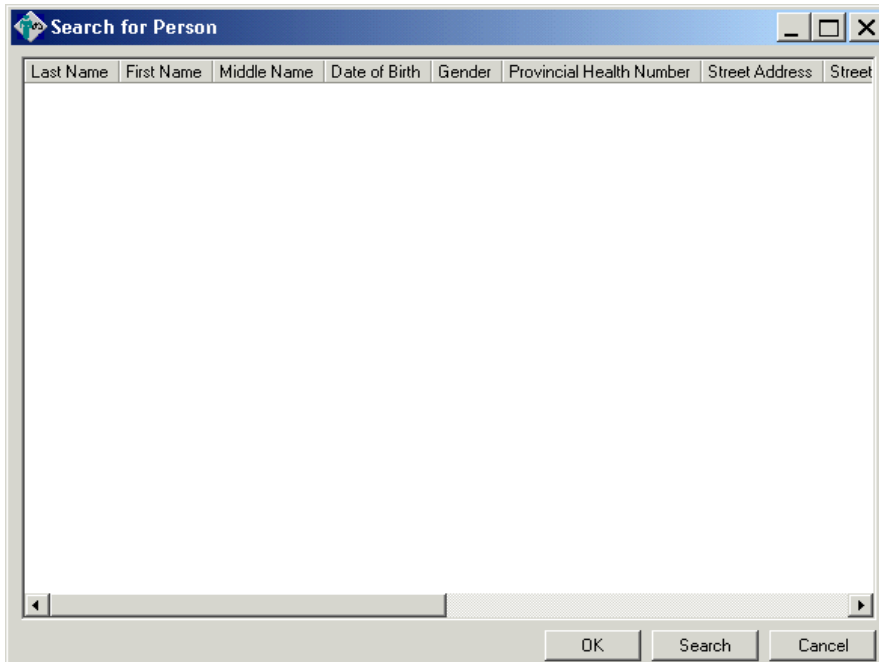
14. At the top left of the screen, click on the **Search for Person Icon**
15. A message will appear at the bottom of the screen "**Executing search for person narrow Transaction.**"
16. Another message will appear: "**You can review the response to inquiry now by clicking the transaction toolbar button**".
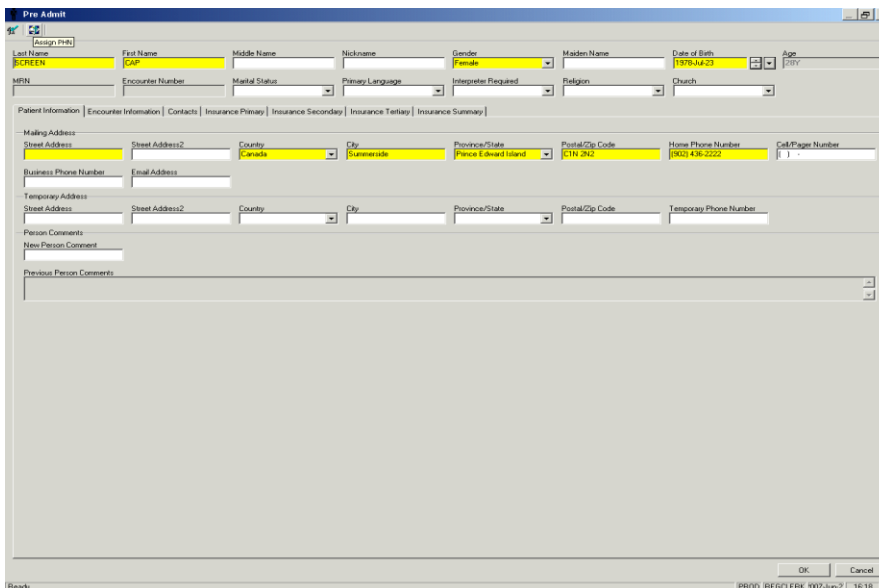
17. The "**Search for Person**" Icon top left of the screen presents with a green checkmark.
18. Click on the Green checkmark (Search Person Icon)

Search for Person Box opens

19. If your patient is found in this box, click the "Cancel" button.
20. Then click the Cancel button on your Registration screen and cancel the Transaction and **research** the Cerner System for your patient.
21. If Your patient is not found in the Search for person box Click OK

Preadmit Screen (Assigning PHN)

22. Click on the Assign PHN Icon top Left Hand screen.

Following Message will Appear.

Assign PHN

This transaction will create a PHN for this patient. Are you sure this patient does not already have a PHN?

Yes   No
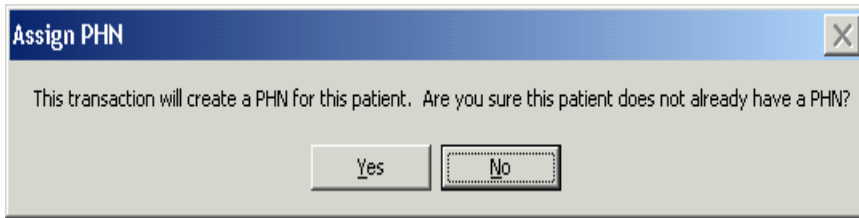
23. Click Yes

24. Execute Assign A PHN Transaction message will appear at the bottom of the screen and the MRN will populate the MRN field.

25. You have received a response to your inquiry will show as a message bottom of your screen.

26. In the Appointment Type field, type in the first few letters of your Appointment Type name and press your Enter key or the ellipses button. The Appointment Type Help window will display.
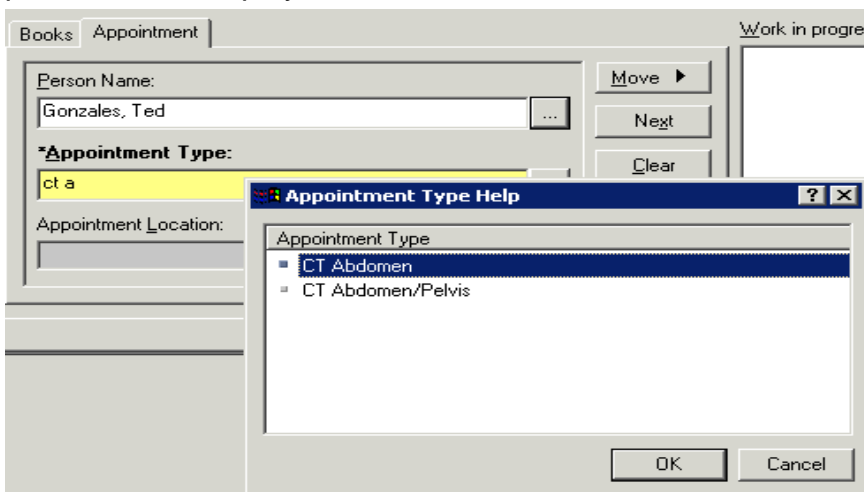
27. Select the appropriate Appointment Type name and press the OK button. The Appointment Type name will now display in the Appointment Type field.

28. In the Appointment Location field, press the dropdown to select the appropriate location for the appointment to be performed. **Note**: If there is only one valid location for the Appointment Type you selected, then the Appointment Location will automatically default and you will not be required to select one.
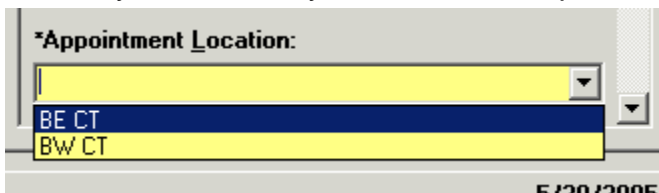
29. If your user preference is set to allow for multiple appointment locations, then you will see an ellipses button rather than a dropdown in the Appointment Location field. To select an appointment location with a multi-value field, press the ellipses button and the Location Help window will display.

30. Select the appropriate location and press the OK button.
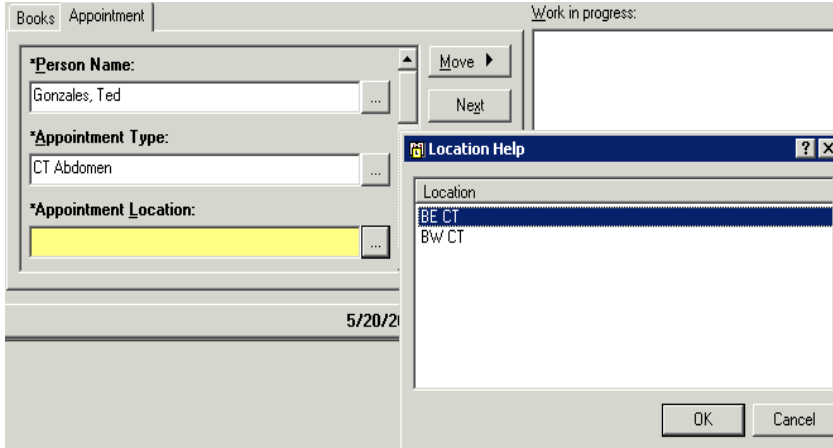
31. Most Appointment Types are built with additional questions to be asked during the scheduling process (Accept Format questions). Answer the remaining questions for the Appointment Type and press the [Move ▶] button to place the event details in the WIP.

32. The order you selected by double clicking will move to the upper middle section of the window beneath the patient's name to show that it has been selected.

33. Press the OK button.
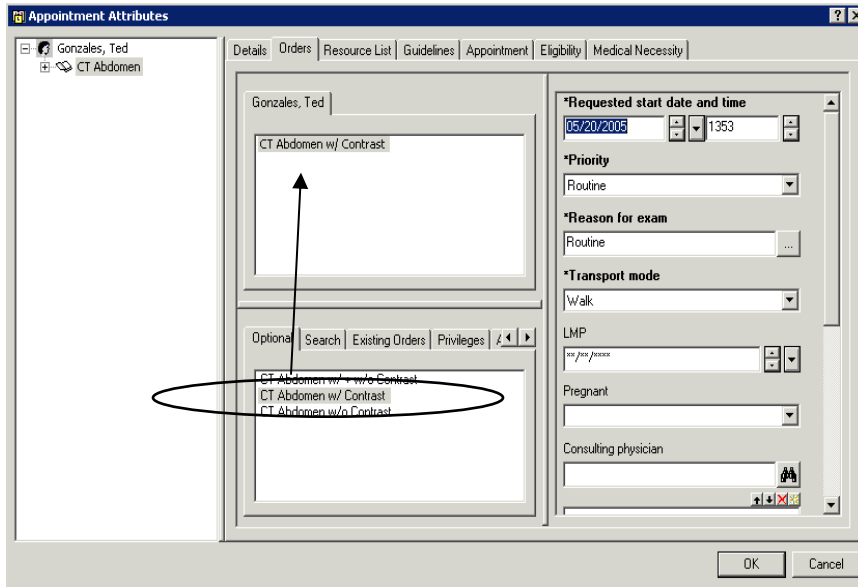
34. The appointment information will display in the WIP (Work in Progress) window.

35. Left click on the resource selected and drag the cursor to the slot that will be scheduled into.
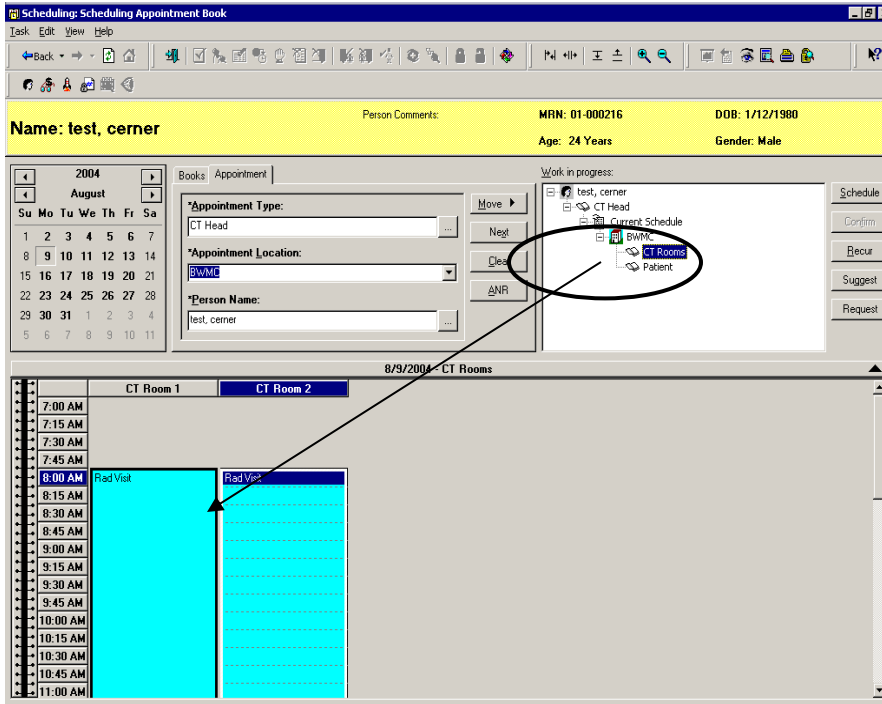
36. Once the mouse button is released the appointment will show in the slot in a pending state, which will be denoted by the red books in the WIP.
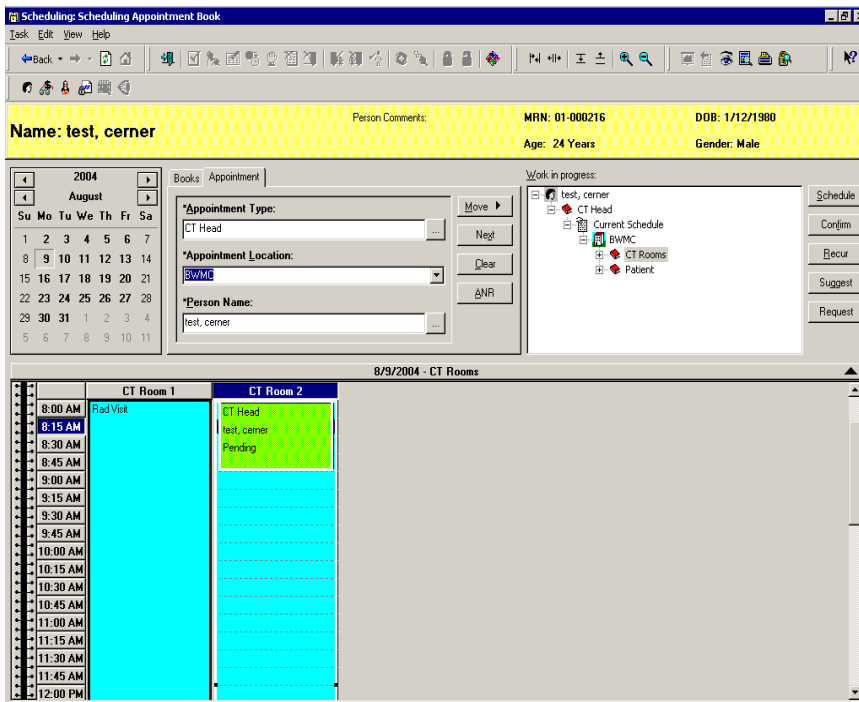
37. Click the [Confirm] button to confirm the appointment. The Confirmation window will display showing a summary of the appointment. You will also see any patient preps associated to this appointment.

38. Encounter Selection box defaults and click on add encounter. (we will be adding add encounter on every appointment that is scheduled.) .There will be an organization box populate, fill out the facility name in the field just enter a couple of letters of the facility and press ellipse and highlight the name and press OK .

39. The Pre Admit screen will populate and fill in all the required fields. (they are highlighted yellow) after the required fields are filled in go and click on Encounter Information Tab, fill in required fields and press OK .

40. Click [OK] in the Summary Box.
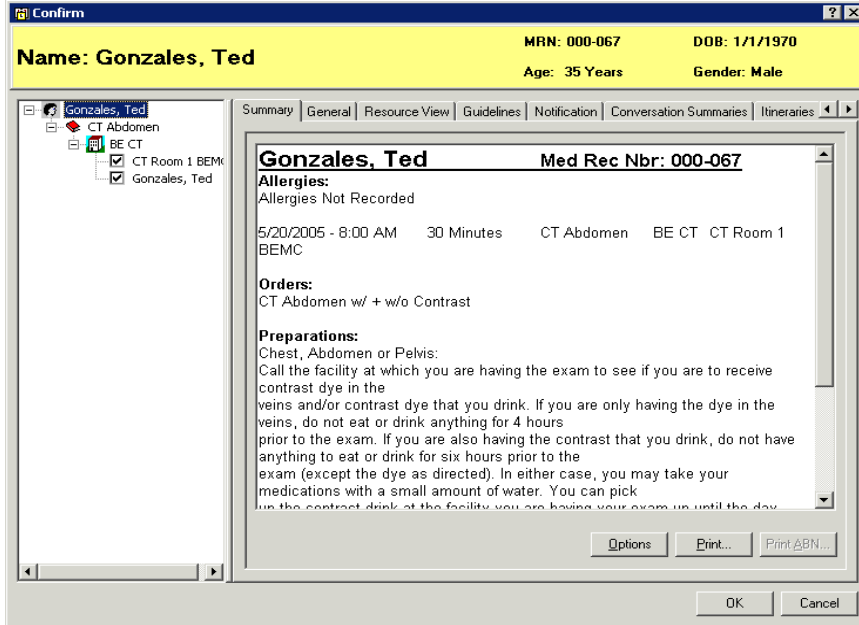
41. The appointment will show in the template as confirmed.

Suggested Scheduling Method

The system can suggest available times at which an appointment can be scheduled based on date and time parameters that you enter. This provides you with date and time options from which you can select without requiring you to locate available slots manually. This method is recommended for those areas where available appointment times are limited and also for more complicated appointments.

Follow the steps from above to fill out the appropriate fields and move your information to the WIP.

To have an appointment booked to a certain resource (which is usually a physician, Therapist, or other health care professional. First pick the order from the Appointment Attribute then go to the TAB RESOURCE LIST in the top of the screen next to orders tab and a list of the resources will populate and then UN check all the resources except the one you are booking for, this will only pick appointments that are opened to that resource.

With your appointment in the Work In-Progress box, click the [Suggest] button to open the Suggested Schedules dialog box.
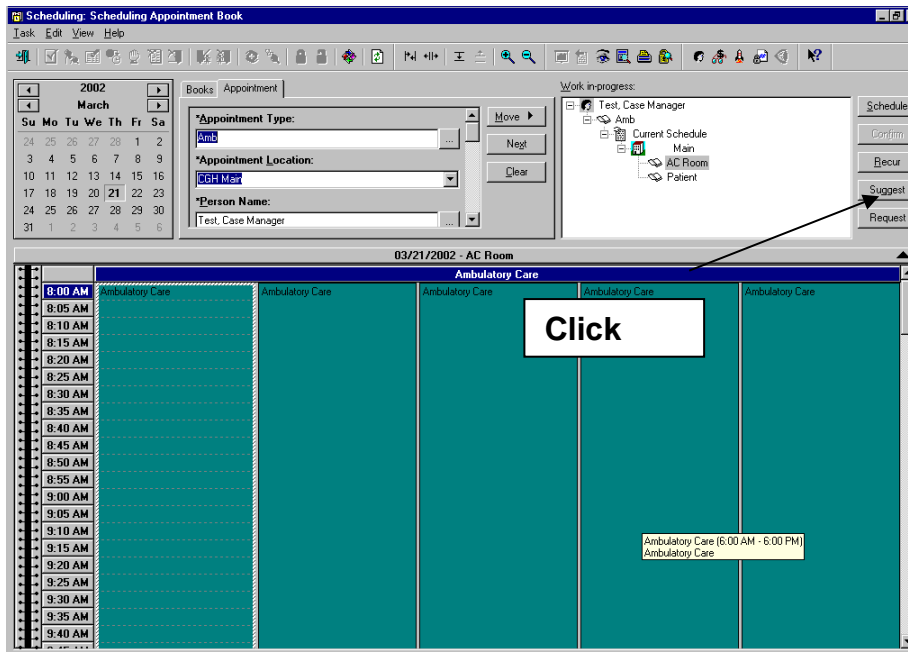
If you want to specify the date range to be considered when the system suggests schedules, select the Date Range option. You then must enter the Begin date and End date to be considered. If you have defined a date range in the Preferences tab, the dates to reflect that preference will default each time you enter this dialog box.
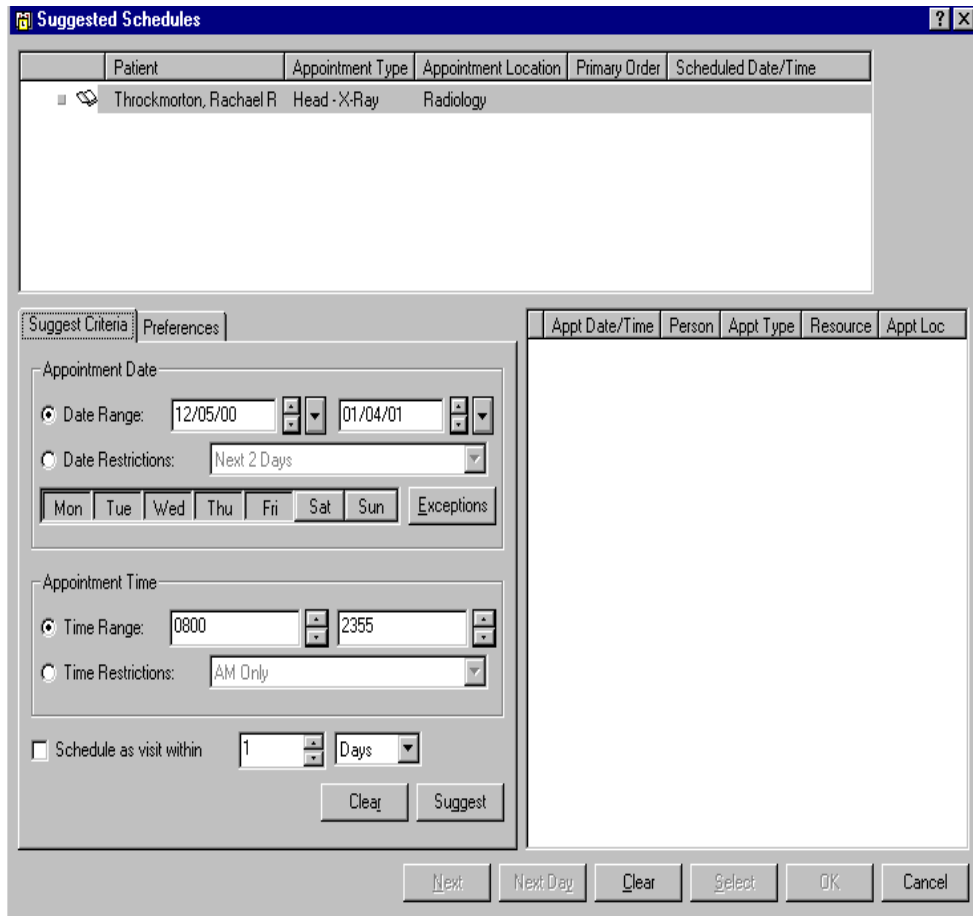
Note: The first time you log on with a new user account, the number of suggestion to return is defaulted to 1. You may want to change this to 10 or 15 to get more than one suggestion.

If you do not want to specify a date range, but you do want to restrict the search for available dates, select the Date Restrictions option. After that option is chosen, you can select restrictions such as "Next 2 Days".

Select the days of the week to be considered when searching for a date to schedule the appointment by clicking the appropriate day of the week buttons. To exclude specific dates, click the Exceptions button to open the Date Exceptions dialog box. If you have defined preferred days of the week in the Preferences tab, the days to reflect that preference will default each time you enter this dialog box.
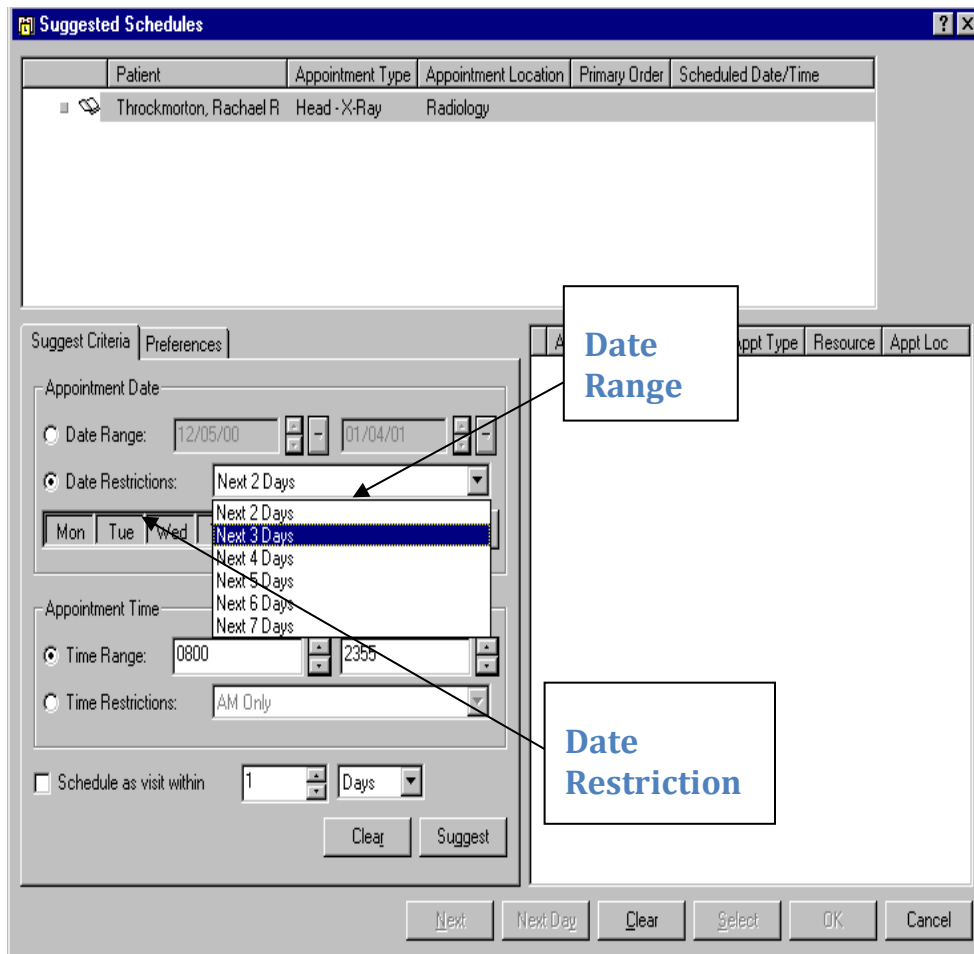
If you want to specify the time range to be considered when the system suggests schedules, select the Time Range option. You then must enter the Begin time and End time to be considered. If you have defined a time range in the Preferences tab, the times to reflect that preference will default each time you enter this dialog box.

If you do not want to specify a time range, but you do want to restrict the search for available times, select the Time Restrictions option. After that option is chosen, you can select restrictions such as "AM Only".
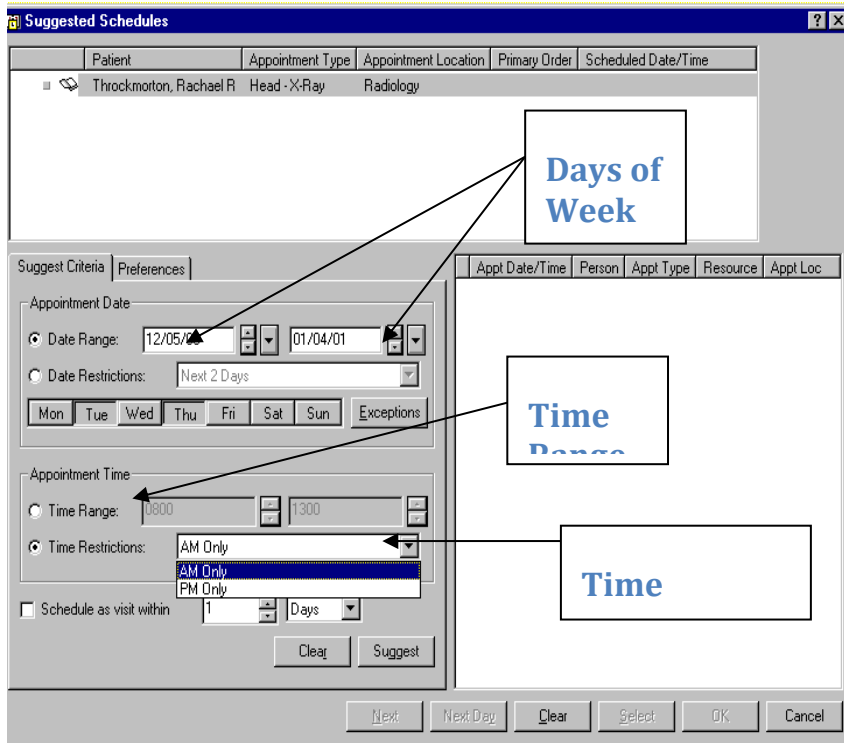
Click *Clear* to clear the information displayed and default back to the preferred settings (except for the visit range) or click Suggest for the system to display suggested times that the appointment could be scheduled. If you previously selected the Schedule as visit within option, the Suggested Sequence dialog box is displayed so you can specify the order in which you want the appointment types to be scheduled.

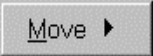If the date and time suggested is not wanted, click Next to display the next available time.

If the day suggested is not wanted, click Next Day to display the first available time at which the appointment could be scheduled on the next valid day.

Once you have found a suggested date and time to use, click Select. Click OK to close the Suggested Schedules dialog box and schedule the appointment or click Cancel to close the dialog box without scheduling the appointment.

Book Request Method

Scheduling with Book Request is helpful for those users who prefer to fill out the appointment information first and then search for an applicable slot.

1. Begin in the Appointment tab as seen in the previous methods. Click the Appointment tab button Appointment .

2. Choose an appointment type and fill out the rest of the fields in the accept format. Click the move button Move ▶ to place the event details in the WIP. (Depending on the appointment selected, an order may have to be chosen as was shown in the previous example).

3. Scroll through the template to find the applicable slot. When the desired time is found, right click on the slot to display the menu.
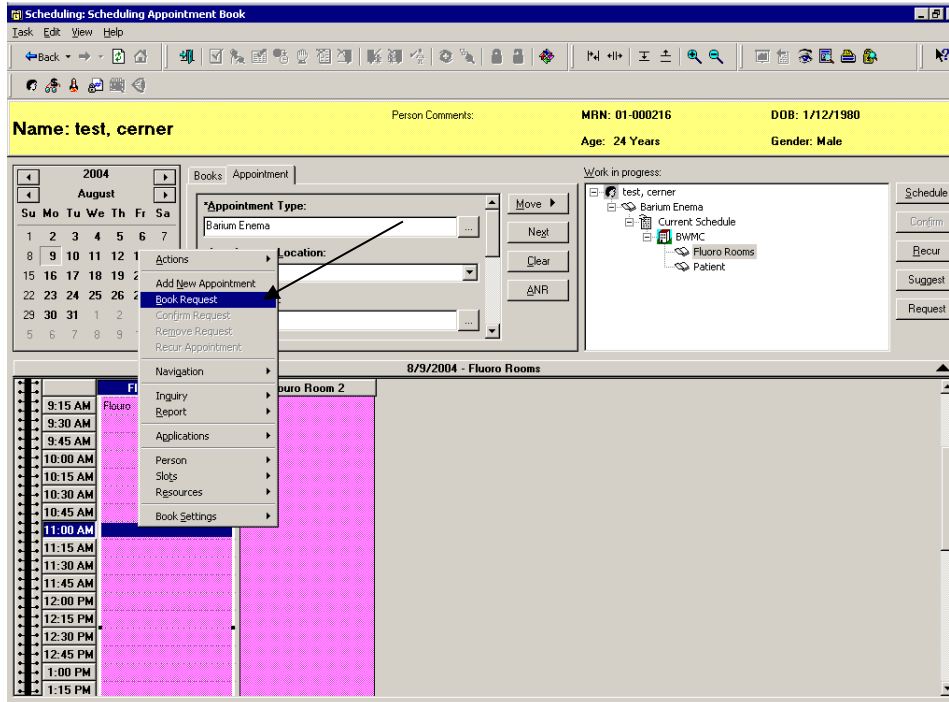
4. Select *Book Request* from the menu. The appointment will then be in a pending state, denoted by the red books in the WIP.
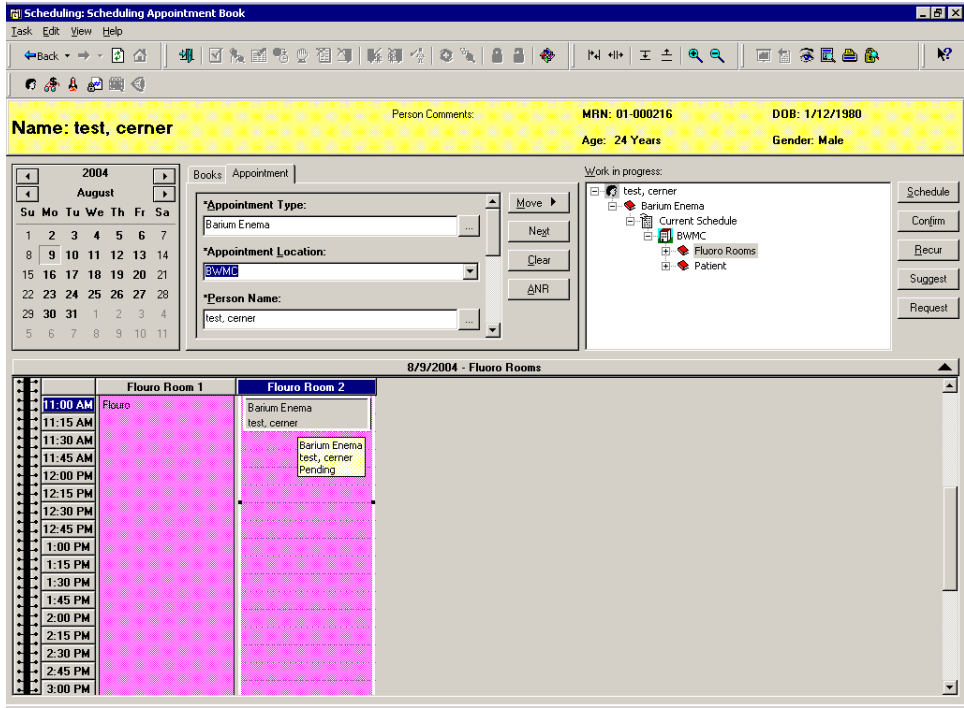
5. Click the **Confirm** button to confirm the appointment and click **OK** in Confirmation window. This will place the appointment in a confirmed state.

Add New Appointment Method

The Add New Appointment method is convenient for users who prefer to locate an available slot and then fill out the appointment information. Once a slot is selected the cursor automatically moves to the appointment type field.

6. Begin by opening the appropriate Appointment Book similar to what was explained in the previous example.

Scroll through the slots and right click on the desired time to display the menu. Click on Add New Appointment (the cursor will prompt in the Appointment Type field).
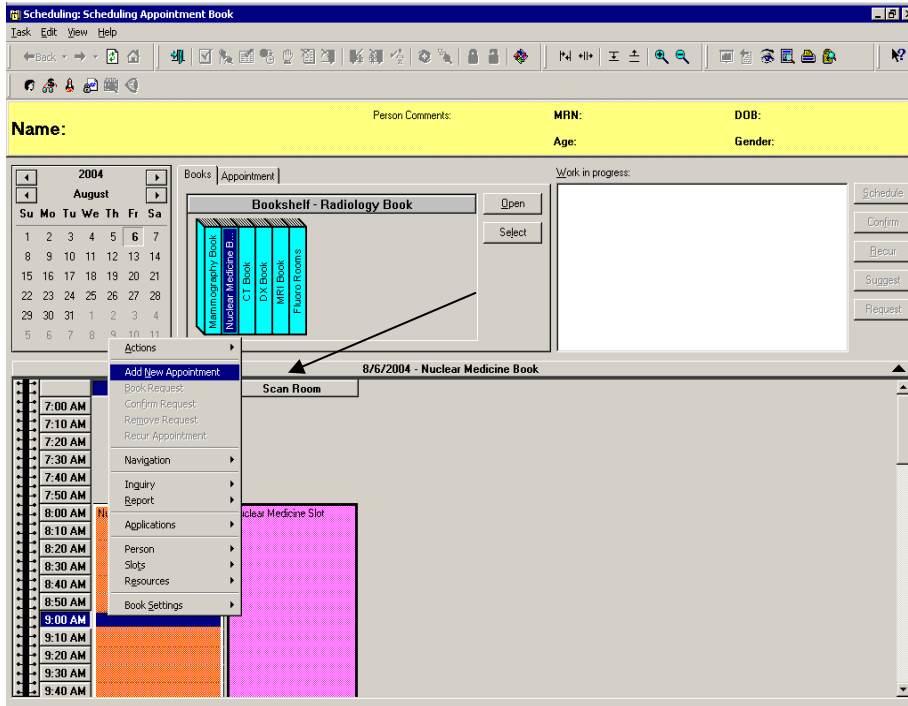
Choose an appointment type and fill out the rest of the fields in the accept format.

Then click the move button [Move ▶] to place the event details in the WIP. (Depending on the appointment selected, an order may have to be chosen as was shown in the previous example). The appointment will appear in a pending state.
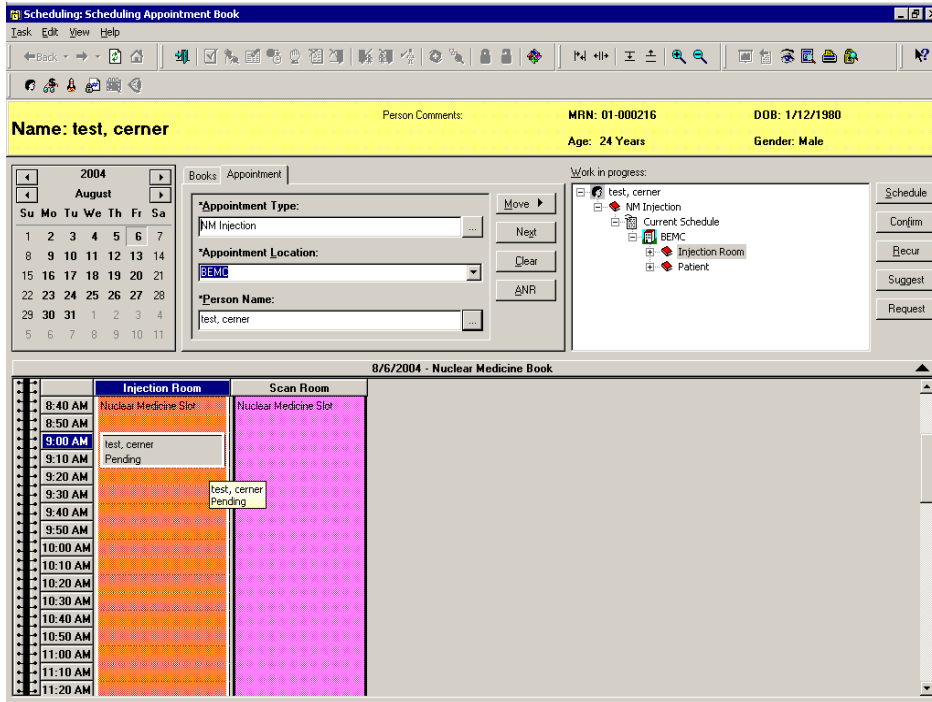
Click the [Confirm] button to confirm the appointment and click [OK] in the Summary Box. This will place the appointment in a confirmed state.
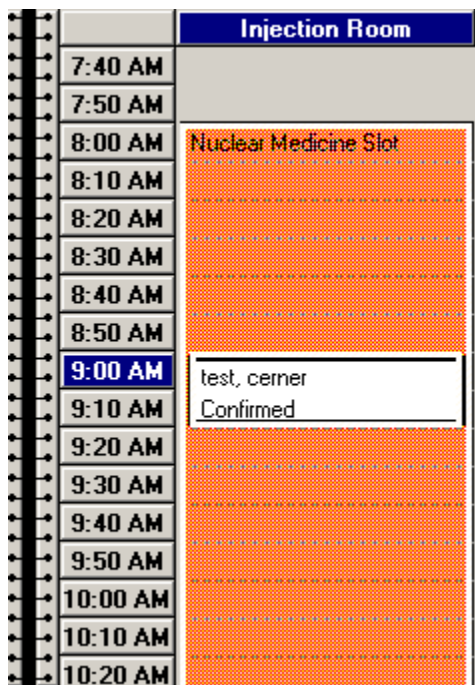
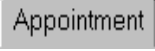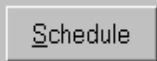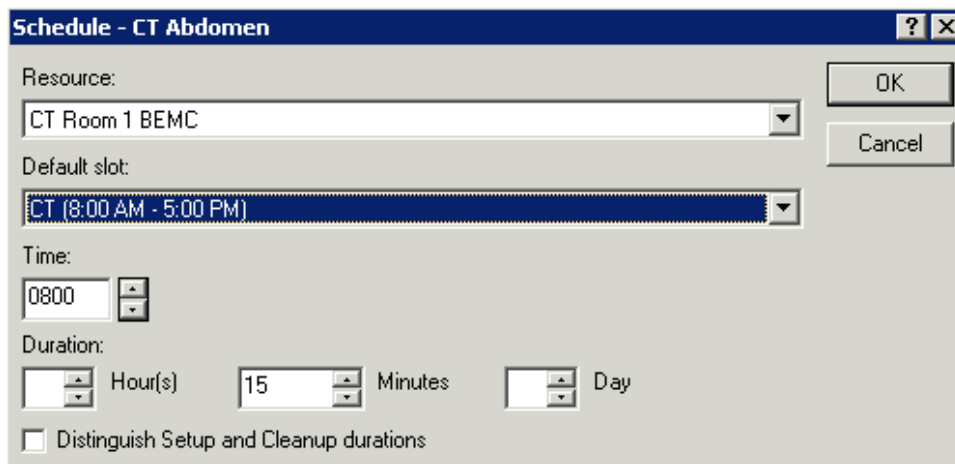## Schedule Button Method

As you will see, the schedule button allows the user to view the default selections such as duration and slot. Within one window, the user can verify or change the resource, duration, slot, and time using the drop down boxes that display available options. This option is recommended for booking outside the slot (overbooking) only. It is the **least** recommended method for booking regular appointments as users can accidentally book appointments outside the slot and allow for potential double booking.

1. Click the Appointment tab [Appointment] and fill out all the appropriate accept format fields in the same manner as the previous examples.
2. Press the MOVE button to move the information to the WIP.

3. Click the appointment and then click the [Schedule] button. The Schedule Box will open and prompt for the Resource and Default Slot that you wish to schedule the appointment to.

Schedule - CT Abdomen	? ✕

Resource:

CT Room 1 BEMC ▼	OK
	Cancel

Default slot:

CT (8:00 AM - 5:00 PM) ▼

Time:

0800 ▲▼

Duration:

▲▼ Hour(s)	15 ▲▼ Minutes	▲▼ Day

☐ Distinguish Setup and Cleanup durations

4. Select a Resource and a Default Slot and click [OK] to schedule the appointment. Note the appointment now appears under the resource and in the time slot previously selected in the Schedule window in a Pending status.
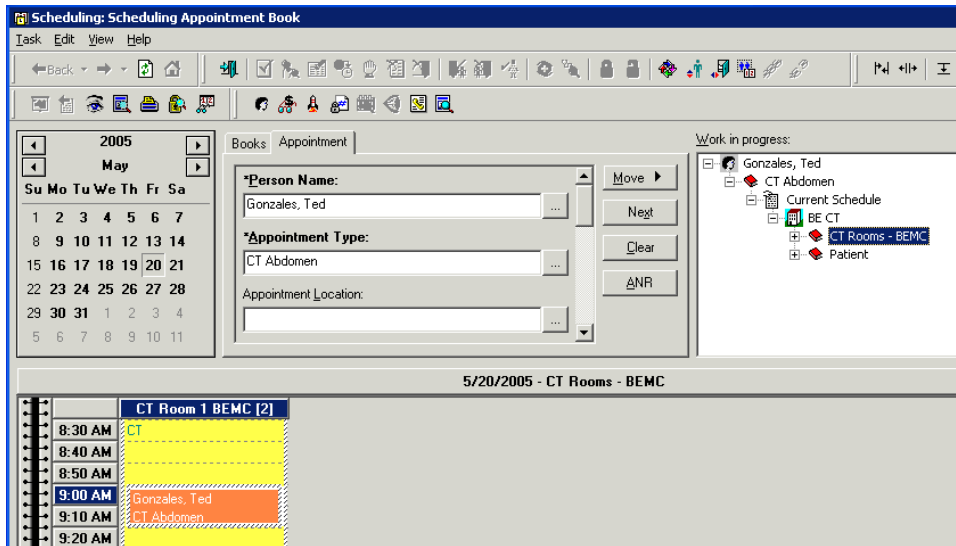
5. To confirm the appointment click [Confirm] and the Confirmation window will display.

6. Click [OK] to close the Confirmation window. The appointment will now display in a Confirmed status. If you need to go back and change the appointment date or time you can click cancel and still go back and make the changes.

Multiple Appointment Type Scheduling

You can schedule more than one appointment for a patient without entering in all of the same information twice.

Enter in appropriate information into the accept format fields and press the MOVE button to move the information to the Work-In-Progress. (WIP)
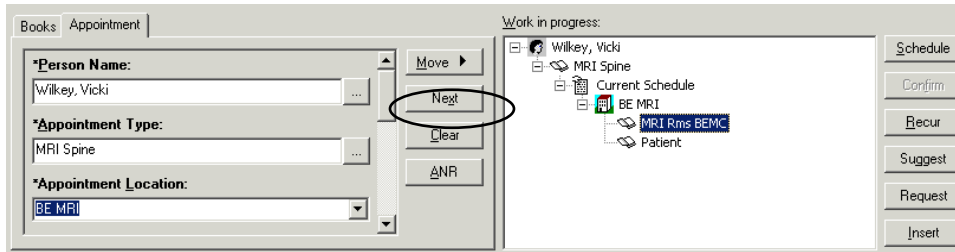

Once you have entered in all of the information for the first appointment, press the NEXT button. Your cursor will move back to the fields within the Appointment tab.

In the Appointment Type field, replace the first Appointment Type name with the next appointment type that you are scheduling and press enter or the ellipses button to search. Select the appropriate Appointment Type from the search window.

Select the appropriate Appointment Location.

Scroll down through the rest of the accept format questions. You will notice that the information you entered on the first appointment is still in the fields. Change any appropriate information and press the MOVE button. REMEMBER WHEN IN THE APPOINTMENT ATTRIBUTES SCREEN TO UNCHECK THE RESOURCES YOU DO NOT WHAT RETURNS ON TIMES FOR. GO TO THE RESOURSE TAB AND UNCHECK WHO EVER YOU ARE NOT BOOKING FOR.

Both appointments will now display within the WIP.
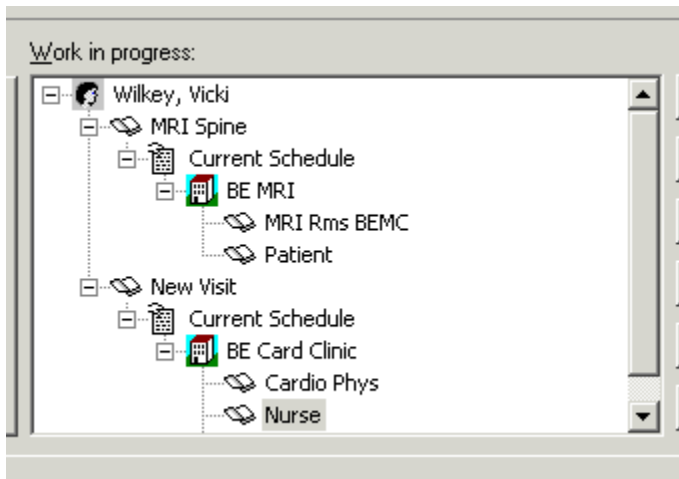
Press the Suggest button to allow Suggested Scheduling functionality to help you find an available appointment time. The Suggested Schedules window will display.

Press your Shift key and highlight both appointments.

In the lower left portion of your screen, click the checkbox next to Schedule as a Visit Within. Leave the timeframe defaulted to 1 day. This will allow you to find an available appointment time for both appointments within a one day timeframe.
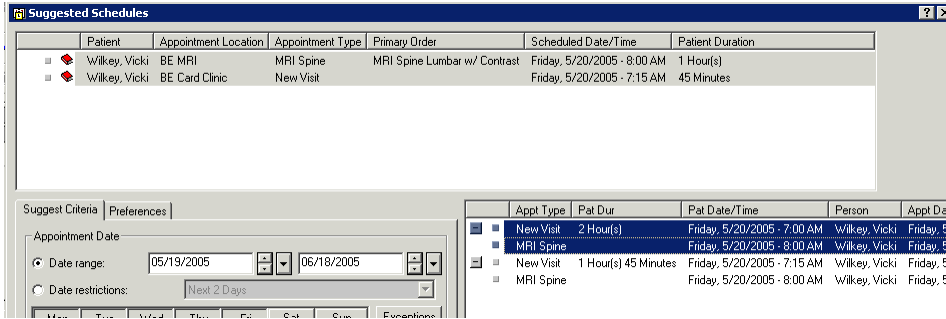

Press the Suggest button.

The Suggested Sequence window will display. This allows you to indicate to the system which appointment you would like to schedule first. Leave the appointments in the order they default and press the OK button.


In the lower right portion of the screen, you will see times which are available for booking both appointments.

Highlight one of the available times and press the SELECT button.

Press the OK button and both appointments will display in the WIP in a pending status.

Highlight the patient's name, press the CONFIRM button, and the Confirmation window will display showing a summary of both appointments.
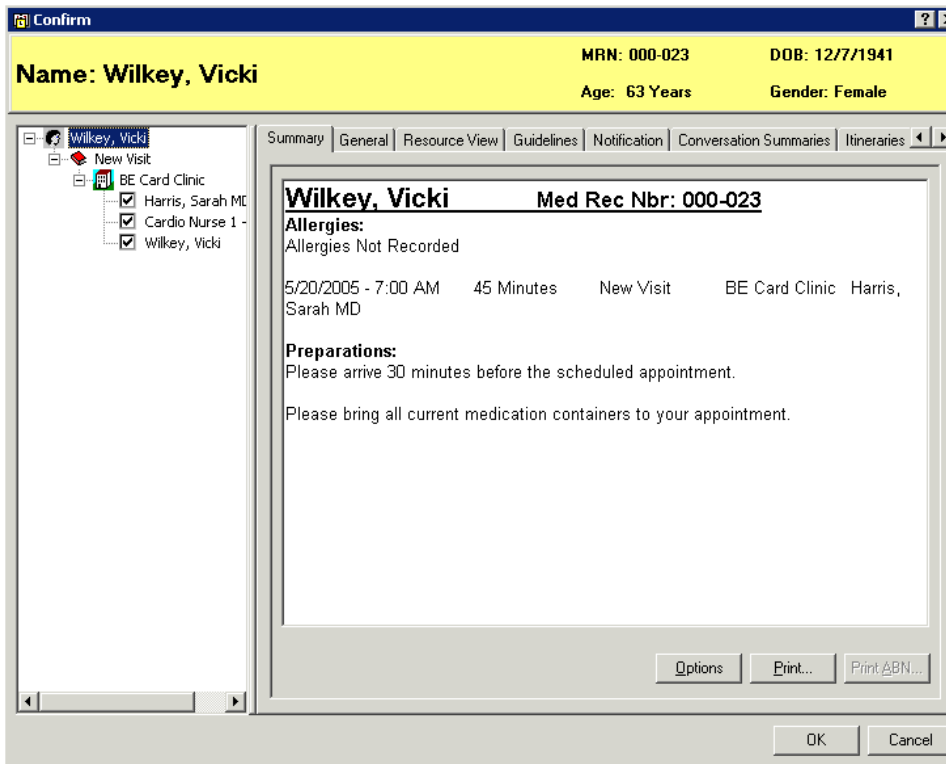
Press the OK button. The appointment is now in a Confirmed status and no longer displays within the WIP
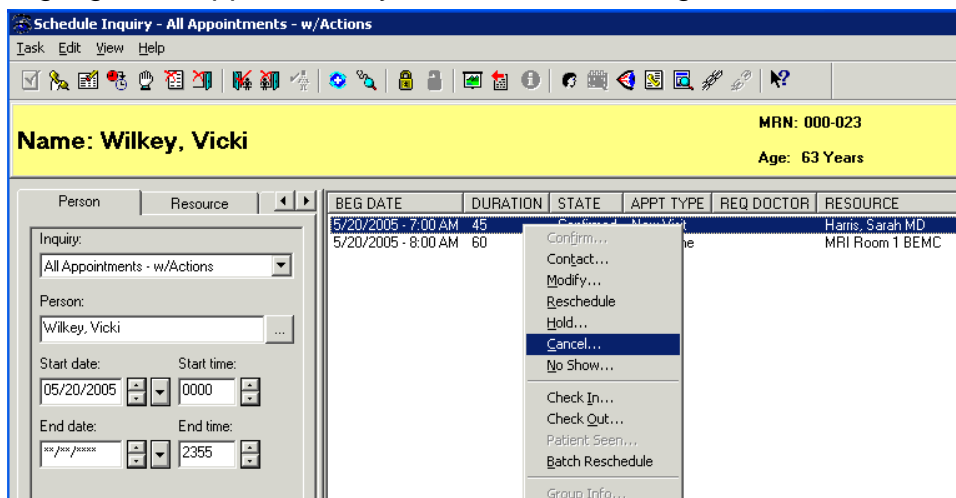
Appointment Cancellation

There are multiple methods for canceling appointments. The most commonly used are to perform the action from an Inquiry, from right-clicking on the appointment within the grid area or using the Cancel icon on your toolbar.

To cancel an appointment through an Inquiry, first open the appropriate Inquiry. You may search by the patient's name using the Person Inquiry, search for the appointment by the Resource name using the Resource Inquiry, or search by the appointment's scheduled location using the Location Inquiry.

Select the Inquiry type of your choice, fill out the appropriate search criteria and press the FIND button.

Highlight the appointment you wish to cancel, right click and choose Cancel.
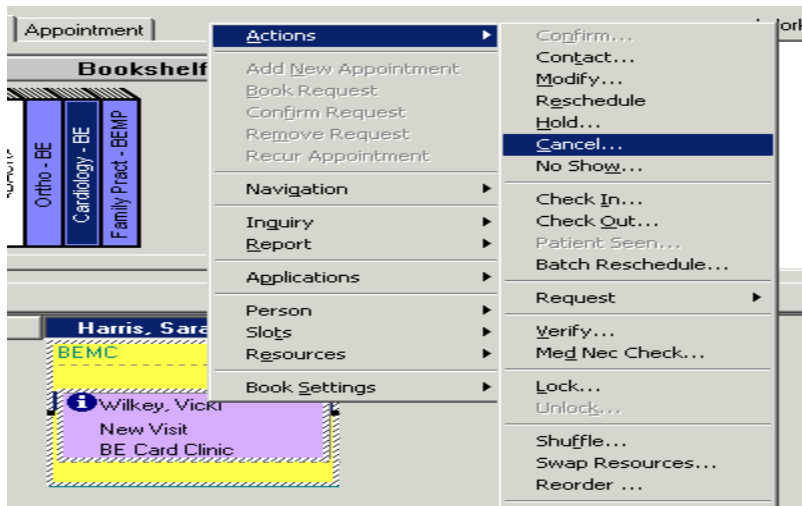

The Cancellation window will display. Select an appropriate reason in the Cancel Reason dropdown and press the OK button.
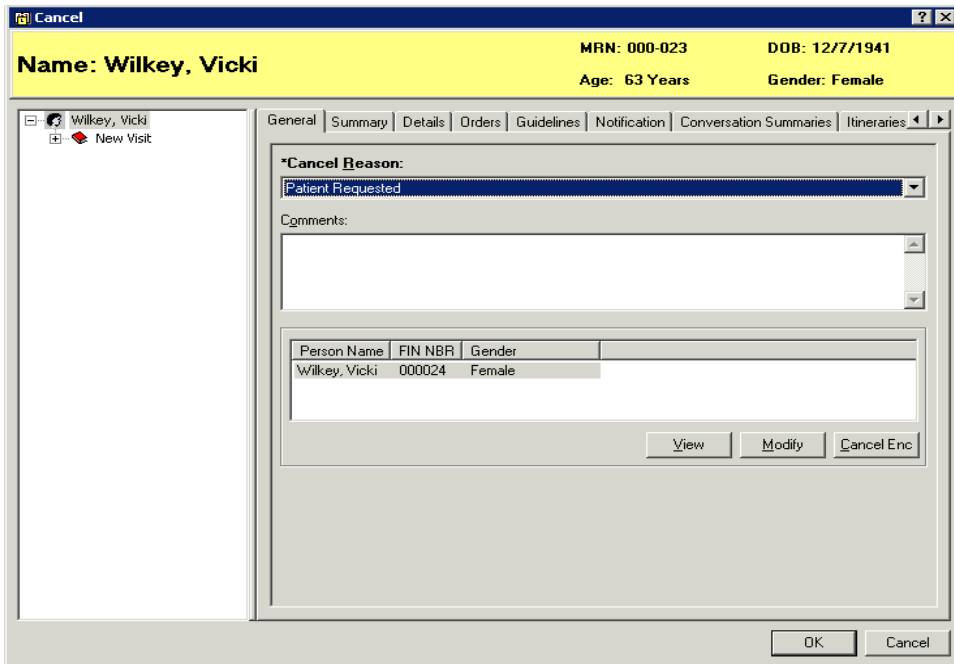
The appointment is now in a cancelled status. If there are orders associated to the appointment you are canceling, you may also be prompted to enter a cancel reason for the order.

You may also cancel appointments directly within the grid area. To accomplish this, right click, go to Actions, then Cancel.

The Cancellation window will display and the same steps as above are followed.

Another method for canceling appointments is to use the Cancel icon.

Again, highlight the appointment you want to cancel, and then click the cancel icon at the top of your screen.

The Cancellation window will display the same as in the previous methods of appointment cancellation.

The Cancellation window will display the same as in the previous methods of appointment cancellation.

After Cancelling the Scheduled encounter, you must go into PM Launch Icon ⊜ and cancel the pre admit encounter.

Pick Discharge on drop down, chose proper encounter, and then for Discharge disposition:

**CANCELLED ENCOUNTER** and Discharge Location: **CANCEL**
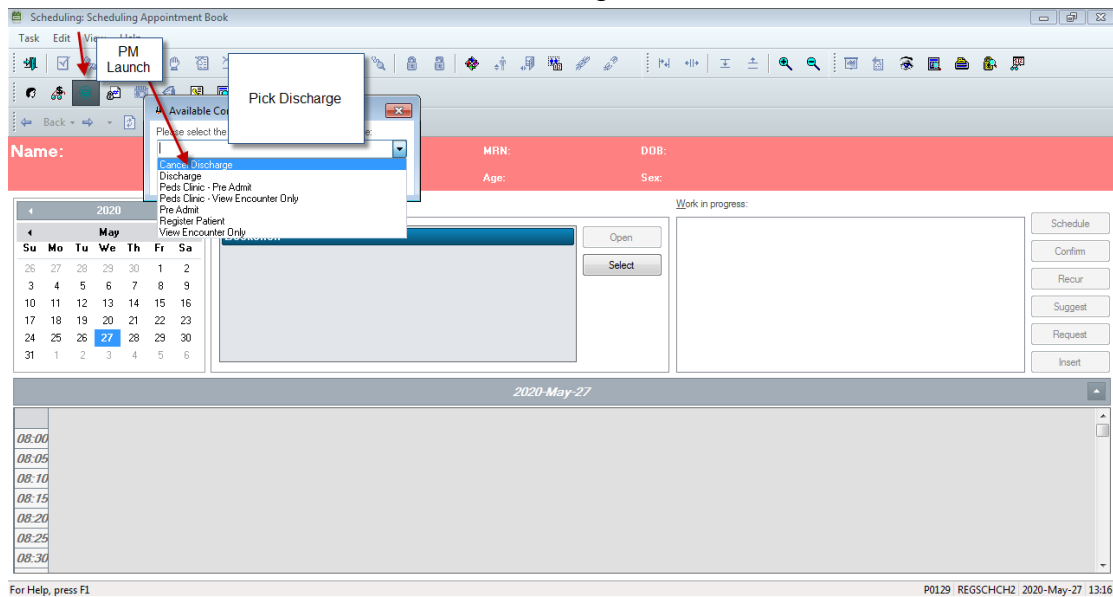
Appointment Reschedule

There are multiple methods for rescheduling appointments. The most commonly used are to perform the action from an Inquiry, from right-clicking on the appointment within the grid area or using the Reschedule icon on your toolbar.

1. To reschedule an appointment through an Inquiry, first open the appropriate Inquiry. You may search by the patient's name using the Person Inquiry, search for the appointment by the Resource name using the Resource Inquiry, or search by the appointment's scheduled location using the Location Inquiry.

2. Select the Inquiry type of your choice, fill out the appropriate search criteria and press the FIND button.

3. Highlight the appointment you wish to reschedule right click and choose Reschedule.
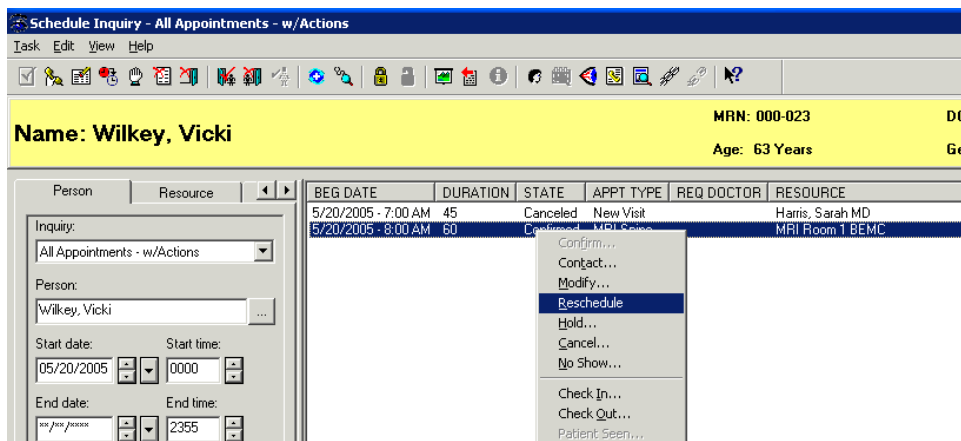
4. The Existing Encounter warning may display if your appointment currently has an active encounter associated. Press the YES button to retain the encounter association.
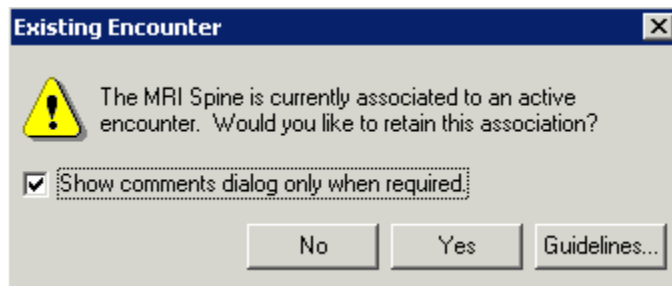

5. If there is an order associated to your appointment, the Appointment Attributes window will display. Press the OK button within this window.

6. The appointment information will now display within the WIP.
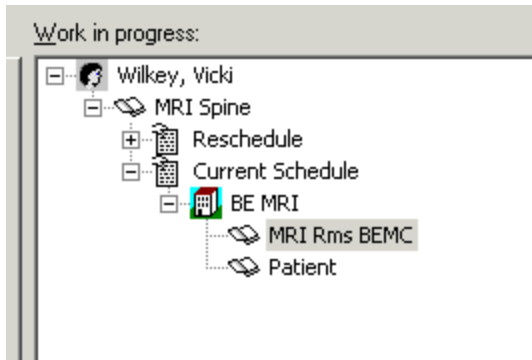
7. From the point, you will find a new available appointment time using one of the methods previously described. Find a new appointment time and press the Confirm button. The Confirmation window will display. Press the OK button.

8. The Reason for Reschedule window will display. Select a reason from the dropdown and press the OK button.
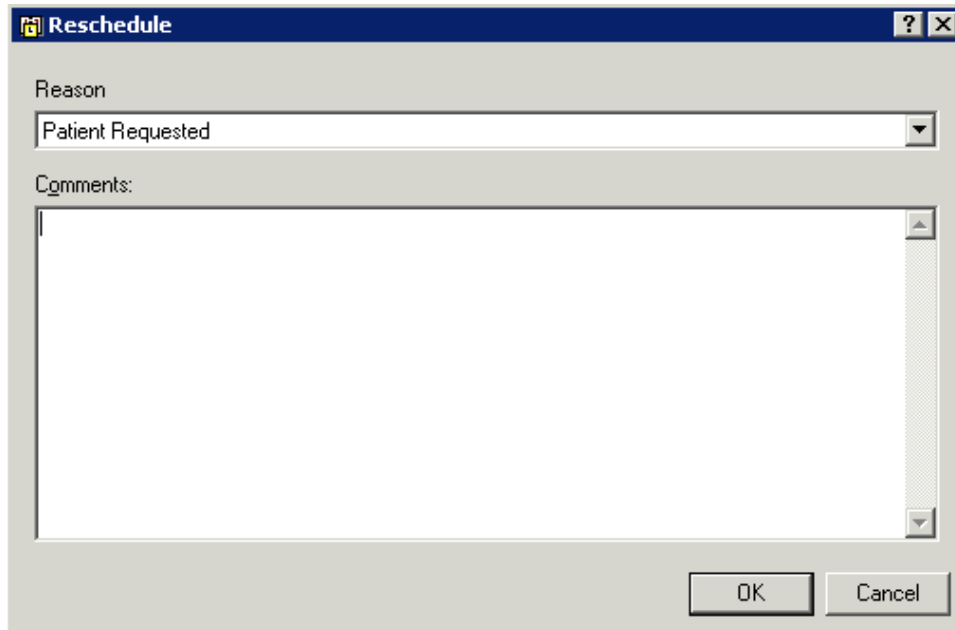
9. Your appointment will now appear in a Confirmed status in the new appointment time.

10. You may also reschedule appointments directly within the grid area. To accomplish this, right click, go to Actions, then Reschedule.
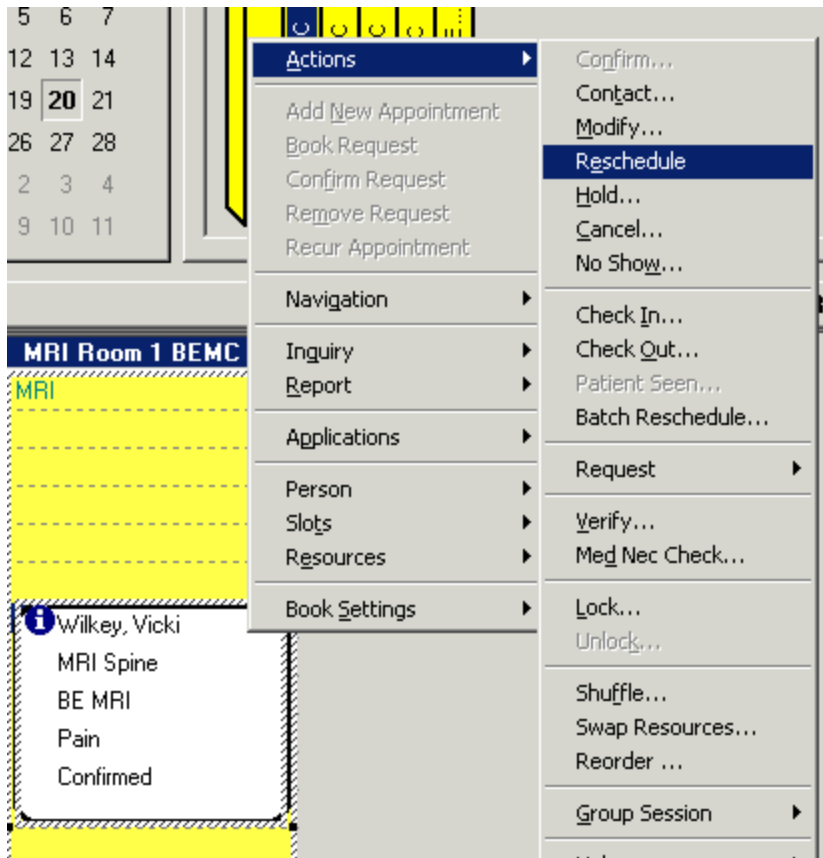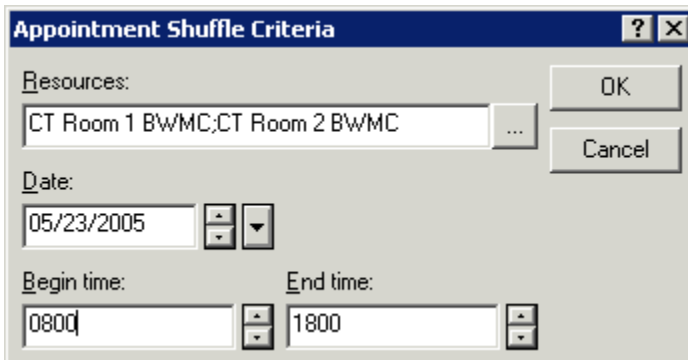
11. The same steps as the inquiry method will be followed from this point.

12. Another method for Rescheduling appointments is to use the Reschedule icon.

13. Again, highlight the appointment you want to reschedule, and then click the Reschedule icon at the top of your screen.

14. The appointment will follow the same process as in the previous methods of appointment reschedule.

Appointment Shuffle

The shuffling feature is used to move around appointments on the same day, without having to go through all of the rescheduling steps. For example, if appointments are scheduled for a particular examination room, and that room is no longer available, you can display the Appointment Shuffle dialog box and drag the appointments from the unavailable resource to available resource.

Select the Shuffle option in the Appointment Book to open the Appointment Shuffle Criteria dialog box. You may also highlight an appointment within the grid area, right click, choose Actions and Shuffle from the menu. (Proportional Single Days in book settings.)

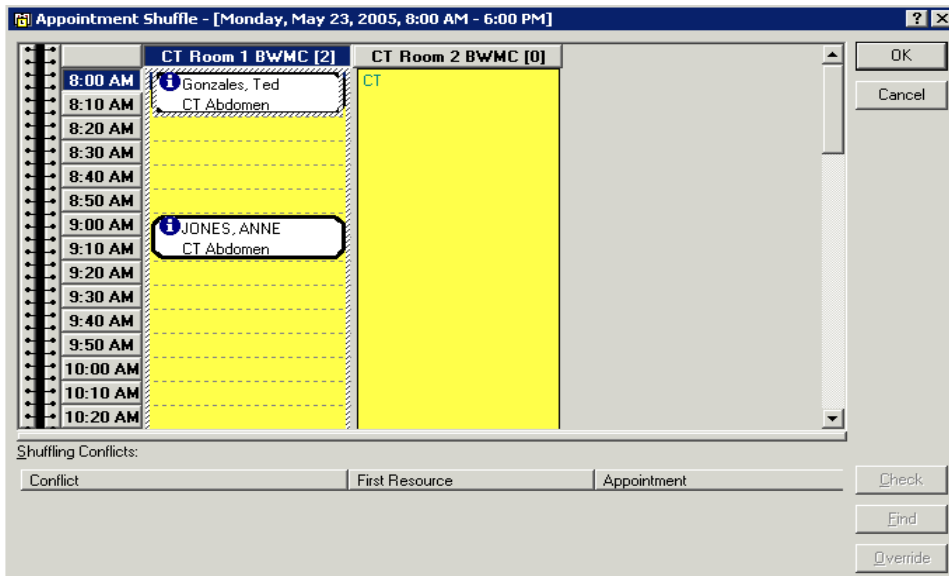The Appointment Shuffle Criteria window will display. Press the OK button.

The Appointment Shuffle window will display.

To move appointments to a different time or Resource, highlight the appointment you would like to shuffle. You are only able to shuffle appointments from the primary resource to which they are scheduled. It is also important to note that appointments can only be shuffled to a new slot or resource on the same day the original appointment was scheduled.

Left click and drag to the appropriate time and Resource. You will see a blue bar display before you release your left mouse click.
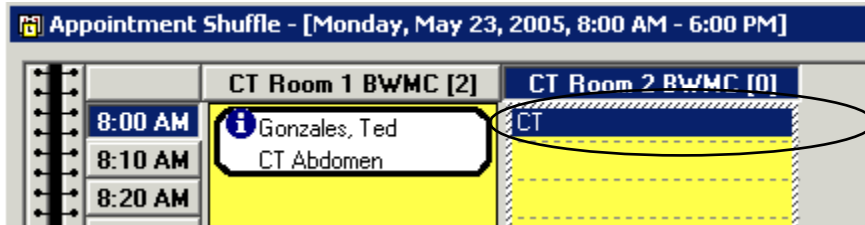
Release your mouse click and the appointment will now display in the new time timeframe in a Pending status.
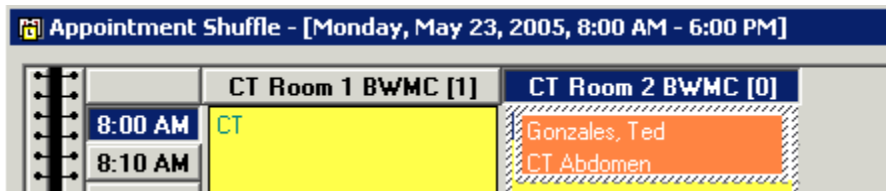
Press the OK button. The Reason for Shuffle window will display. Select a reason form the dropdown and press the OK button.

The Shuffle window will close and the appointment will now appear in a Confirmed status in the new timeframe/Resource.

Recurring Appointments

Recurring appointment functionality is designed to help in situations where an appointment needs to be scheduled multiple times over a specified time period. This type of appointment is most commonly used in the Rehab area where a patient needs to come for therapy multiple times.

Scheduling a Recurring Appointment

Open the Scheduling Appointment Book application, click the Appointment tab, and fill out the accept formats fields the same as in previous examples. Press the MOVE button to move the information to the WIP. Remember to Uncheck the resources in the" Attributes Window" go to resource tab after choosing the orders.

Click the ⎣ Recur ⎦ button. The Recurring Frequencies window will display.

Within the Recurrence pattern area, you have many different options to choose from when selecting the frequency of the appointment. You many choose to pick every Monday and Wednesday, every other week, ect. You also have the option to select which day of the week the patient should be scheduled.

In the Range of Recurrence area, select the date which you would like the appointments to begin and how many instances of the appointment needs to be scheduled.

The Allow Multiple Recurring Frequencies option allows you to select different types of frequencies for different days of the week. For example, you might choose to schedule the appointment for every Monday, but only want to schedule the appointment for every other Wednesday.

Once you have made your selections, press the OK button.

The information for all instances of the recurring appointment will display in the WIP.
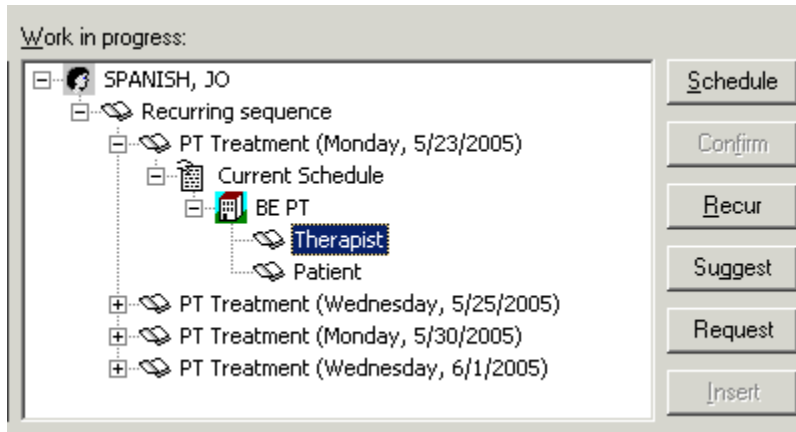

Suggested Scheduling is the best method for finding available appointment times for multiple appointments at once. Press the Suggest button.

All appointments will display in the top portion of the Suggested Schedules window. Press the Suggest button.

Available appointment options will display on the right portion of the screen. Notice that the response included available appointment times for all appointments within the recurring series.

Highlight one of the options and press the SELECT button. A red check mark will display next to the select appointment times.
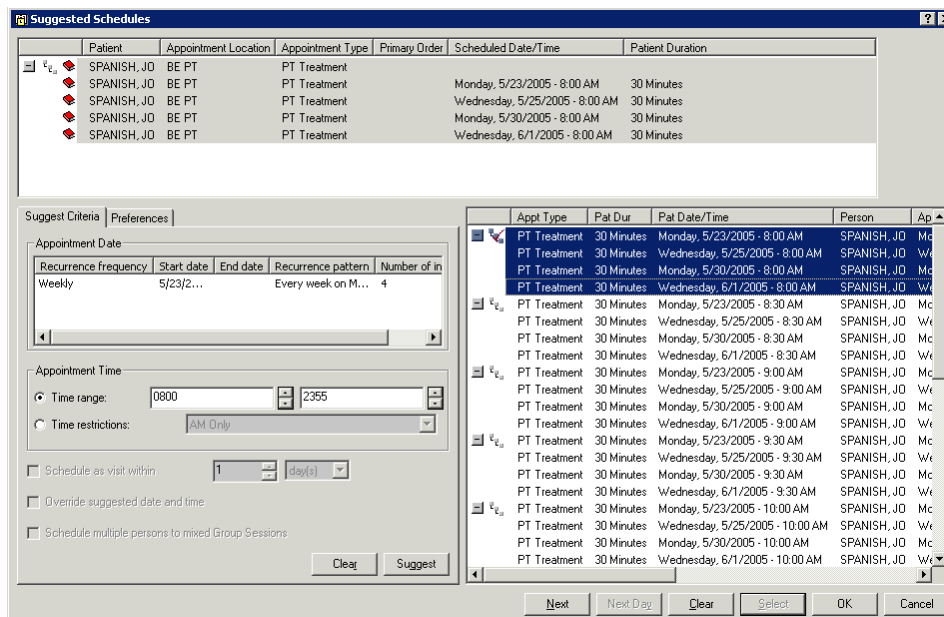
The system will typically return an option which has all appointments within the recurring series occurring at the same time of day for each of the appointment dates. In the example above, the suggestion was 8:00 am. You have the option to search for an alternative time for one or multiple components within the recurring series.

In the upper section of the Suggested Schedules window, select one component of the recurring series.

Press the SUGGEST button again. This time the system will return appointment suggestions only for the highlighted appointment. Highlight a different time option and press the SELECT button.

You will notice that the appointment time has now changed for just that particular component of the recurring series.

Press the OK button. All appointments will appear in a Pending status within the WIP.

Press the CONFIRM button and the Confirmation window will display with all appointment's information. Press the OK button to close the Confirm window.

Modify a Recurring Appointment

When a recurring appointment is scheduled, the system will always recognize that these appointments are tied to together. If you are to perform any action on any one of those appointments, the system will always ask if you intend to perform the action on just one component or all components within the recurring series.

A message similar to the following will display when performing an action on an appointment scheduled within a recurring series:
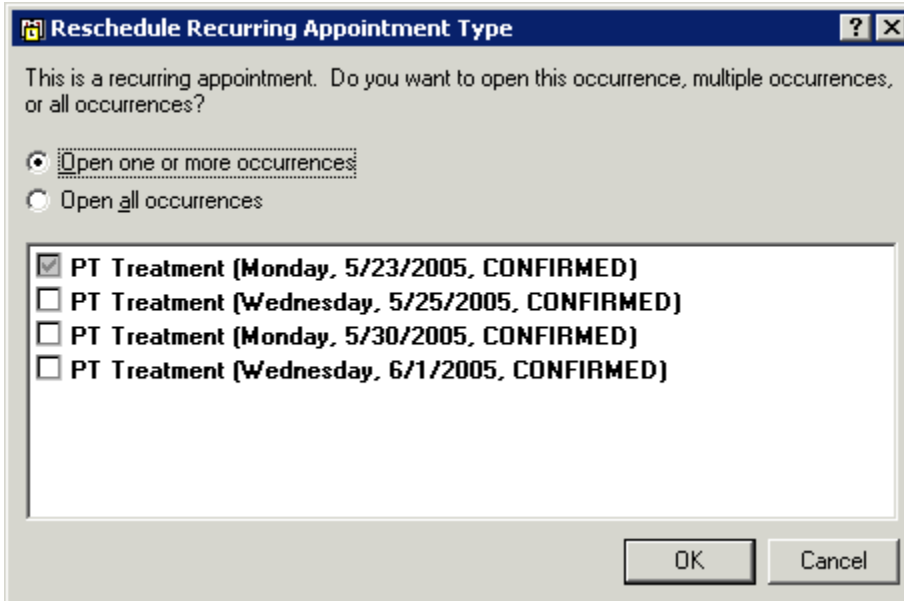

If you choose to Open one or more occurrences, then the action will only affect those appointments that have a checkmark. If you choose Open all Occurences, then the action will affect all appointments within the recurring series.
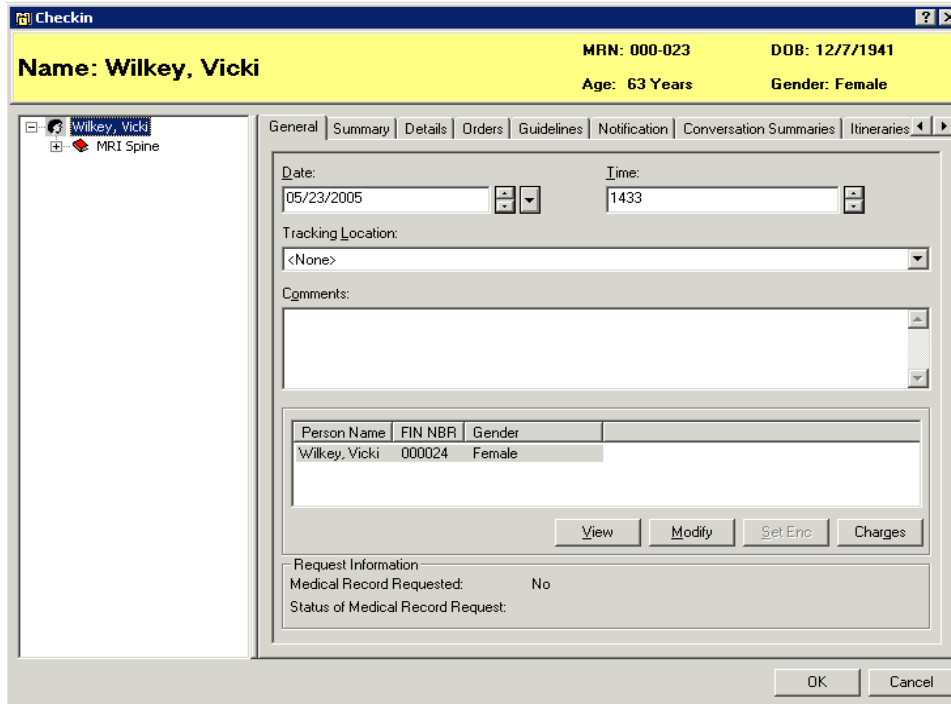
Appointment Check In

Checking-in appointments is a good way to keep track of which patient have shown up for their appointments and which have not. It's also an easy way for a tech, nurse or someone else in the department to know which patients have arrived. There a multiple methods for checking in appointments. The most commonly used are to perform the action from an Inquiry, from right-clicking on the appointment within the grid area or using the Check In icon on your toolbar.

1. To Check In an appointment through an Inquiry, first open the appropriate Inquiry. You may search by the patient's name using the Person Inquiry, search for the appointment by the Resource name using the Resource Inquiry, or search by the appointment's scheduled location using the Location Inquiry.

2. Select the Inquiry type of your choice, fill out the appropriate search criteria and press the FIND button.

3. Once you have located within the Inquiry the appointment you would like to check in, highlight that appointment, right click and choose Check IN
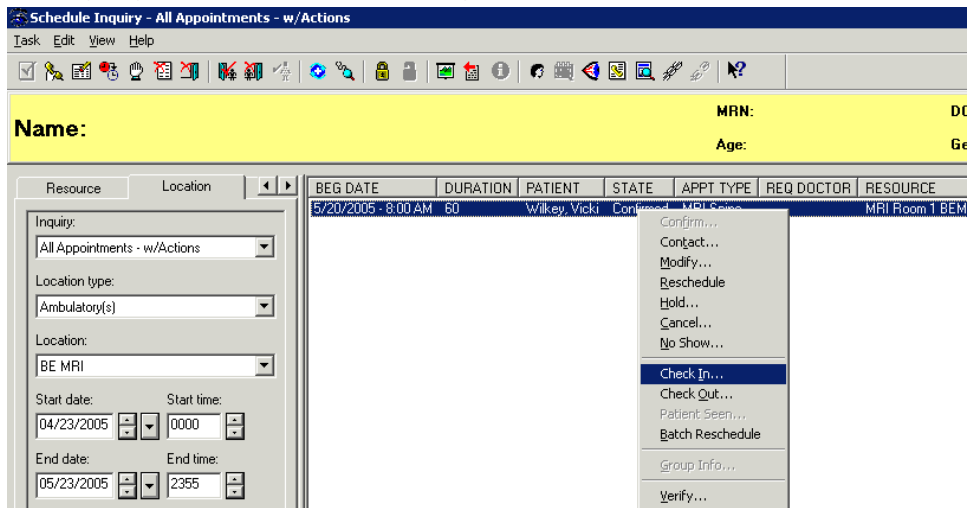
4. The Check In window will display.

5. Press the OK button to complete the Check In process. The appointment is now in a Checked In status.

6. You may also Check In appointments directly within the grid area. To accomplish this, right click, go to Actions, then Check Inl.

7. The Check In window will display and the same steps as above are followed.
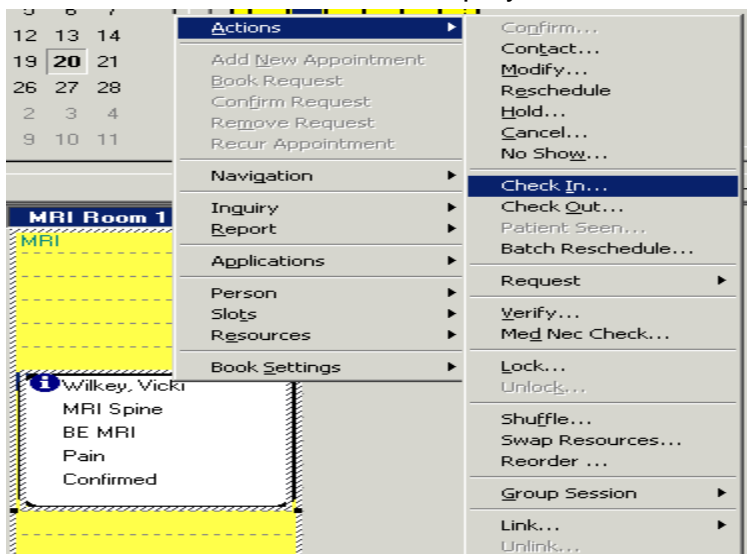
8. You can also highlight the appointment in the grid area, then click the Check-in icon at the top of your screen.

9. The Check In window will display and you will follow the same steps as in the above methods of Check In.

Group Appointments

Group appointment functionality allows you to schedule multiple patients to the same resource all at the same time. This functionality is commonly used in areas that are conducting classes or group therapy.

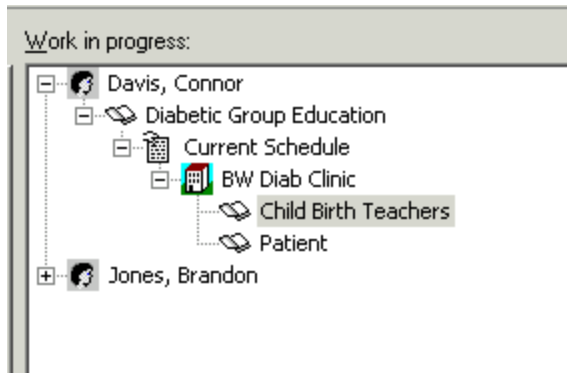## Group Appointment Scheduling

1. To schedule a group appointment, click on the Appointment Tab and enter the patient's name in the Person field. Press Enter.
2. Enter the name of your appointment in the Appointment Type field. Press Enter. The Future Requests/Appointments may display. Click OK to that window.
3. Scroll back up to the Person Name field. Notice that the field changes to allow for multiple patients. This is because group appointment types allow for booking multiple patients to the same resource at the same time.
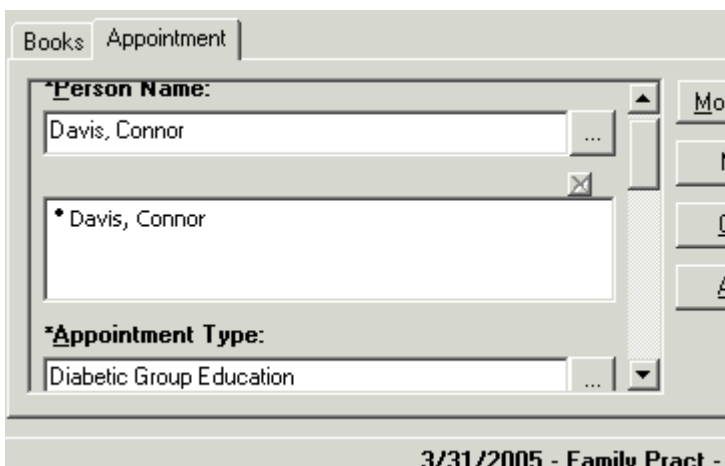

4. In the Person Name field, clear out the first patient's name and type in the name of your second patient. The Person search window will display. Select the appropriate patient from the list and press the OK button.
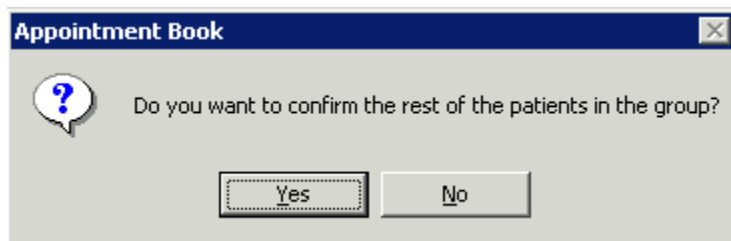5. Both patients should now display.

6. Scroll down and fill out the remaining accept format fields.
7. Press the Move button and the information for both patients will display in the WIP.

8. Use Suggested Scheduling to help find an available appointment time. Press the Suggest button.
9. From within the Suggested Schedules window, press the Suggest button.
10. An available time will display. Press the select button and then press OK.
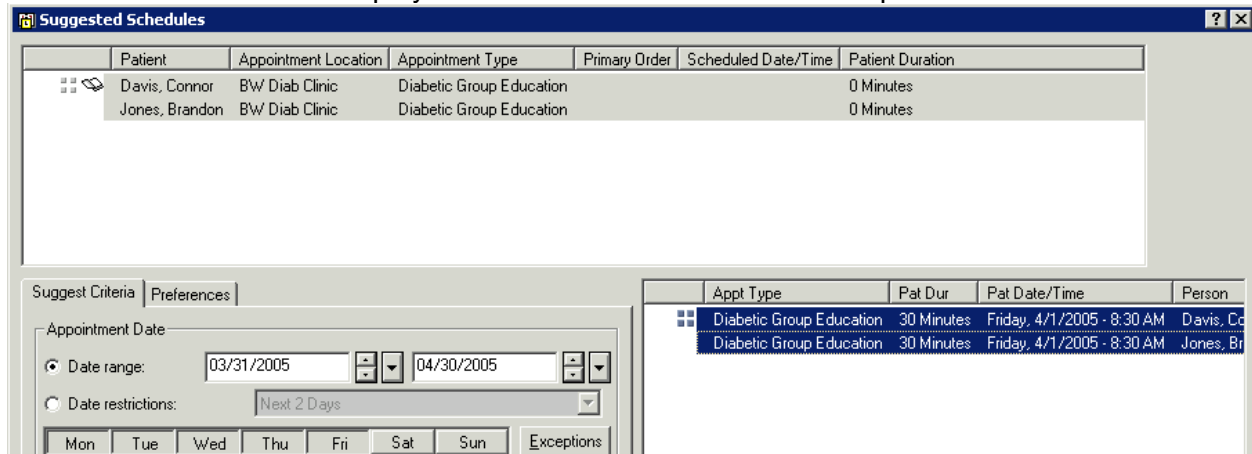

11. Press the Confirm button.
12. You may see a message asking if you would like to confirm all patients in the group. Press the Yes button.

13. The Confirmation window will display. You should see information for both patients contained within the window. Press the OK button.
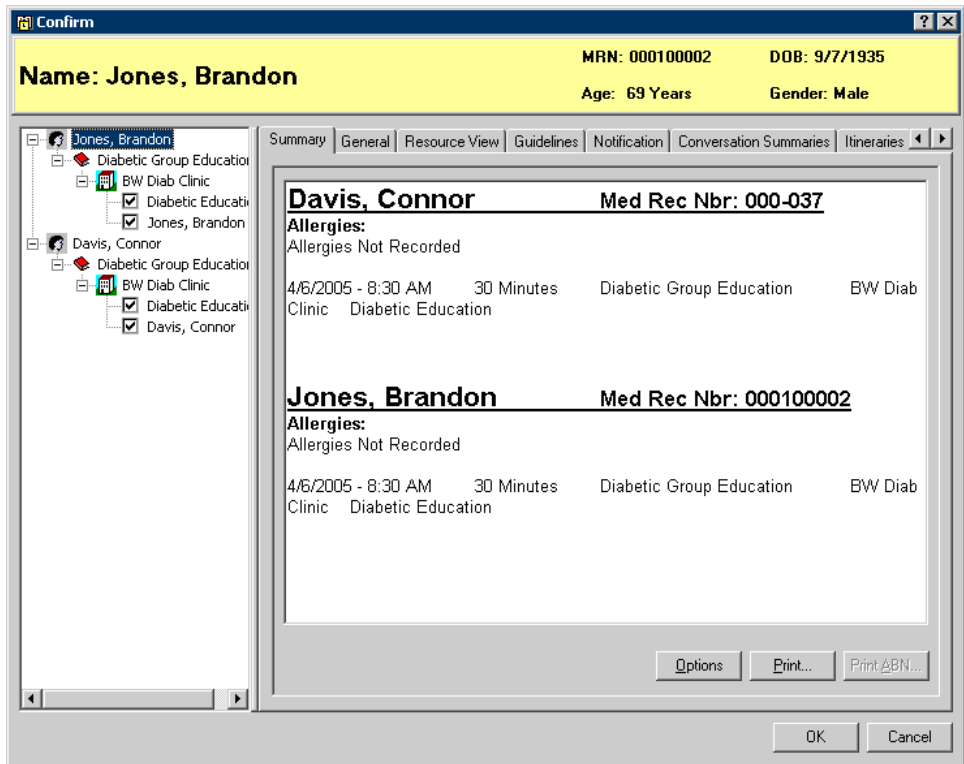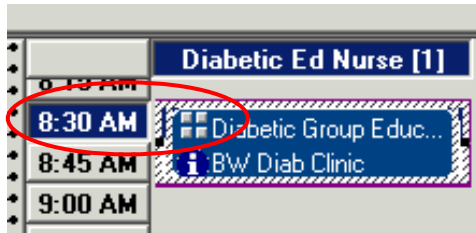
14. If your appointment is built to require an encounter be added at the time of booking, the Encounter selection window will display for both patients. Either select and existing encounter, or press the Add Enc button to generate a new encounter.
15. Click on the Bookshelf bar. Select the bookshelf for the department which schedules the group appointments from the list of Bookshelves and press the OK button.
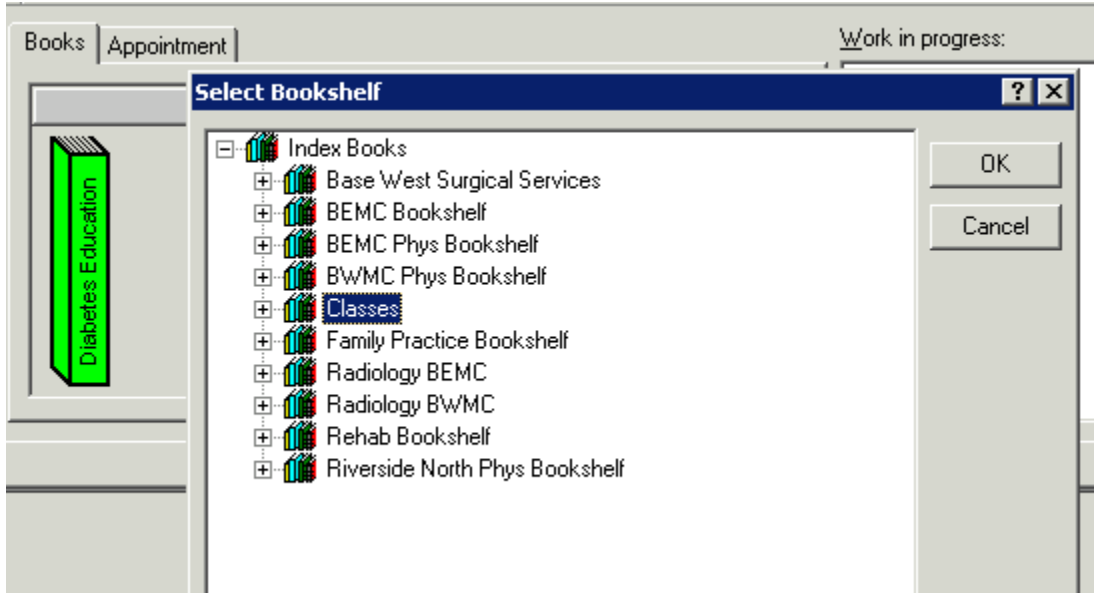
16. Double click on the appropriate book. You should see the resource which performs the group appointments and the available sessions for the day.

17. Press the Group Session icon within the session that you just booked. The Group Session information window will display.

Group Appointment Cancellation and Group Session Inquiries

1. Open Appointment Inquiries by clicking on the [icon] icon at the top of the screen. The Appointment Inquiries window displays.
2. Use the arrow buttons to navigate to the Location tab and click on that tab.
3. Choose Group Session Standard Inquiry from the Inquiry dropdown.
4. Choose Ambulatory from the Location Type dropdown and the appointment location from the Location dropdown.
5. Ensure that your date range is set to include the appropriate timeframe and press the Find button.
6. Highlight the appropriate group session, right click and choose Cancel. The Group Session Patients window will display asking which patients you would like to choose. Select one of the patients you scheduled above and press the OK button.
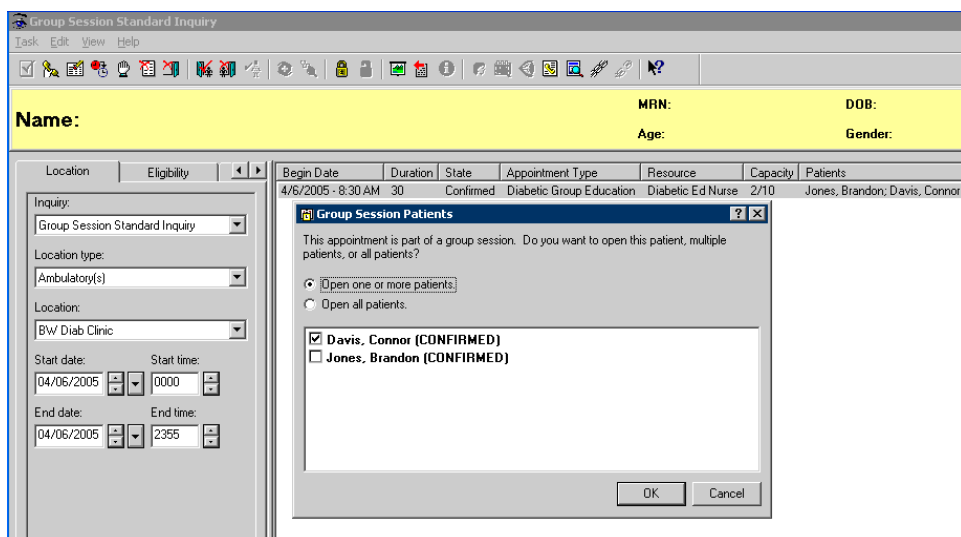

7. The Cancel window will display. Select Patient Requested from the Cancel Reason dropdown and press the OK button.
8. You will now see the Capacity number decrease for the session which your patient was originally booked.

Appointment Link

Appointment link functionality allows you to manually tie two unrelated appointments together for a particular patient situation. Like with Protocols or Recurring appointments, the system will recognize these appointments are linked and warn the user if any action is performed on one of the linked appointments. You have two options for linking appointments: 1) Link to an existing (previously confirmed) appointment or 2) Link to a new appointment.

1. Schedule two different appointments for any patient using one of the previously described methods from above.
2. Find one appointment which you have just scheduled, highlight, right click, go to Actions, then Link. At this point you will see your two options for linking appointments.
3. Choose to link to an existing appointment.
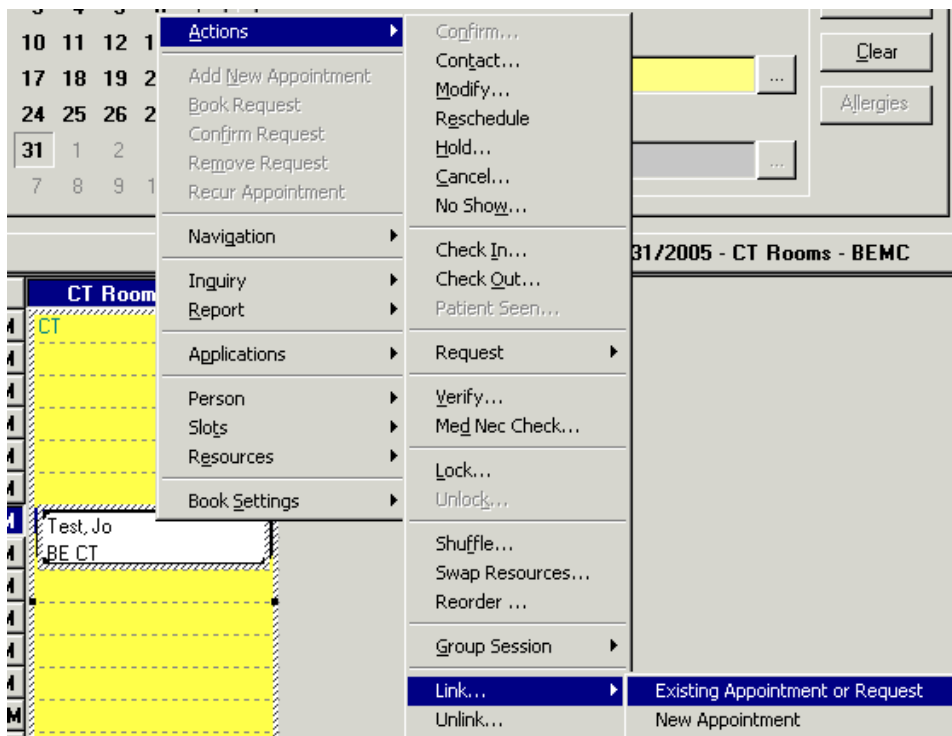
4. The Link window will display. You will notice the Future Patient Appointments section. This section should list the other appointment that you scheduled for this patient. Highlight this appointment and press the Select button. A red checkmark will display.
5. In the Link Reason dropdown, select one of the reasons and press the OK button.

6. The two appointments are now linked.
7. Highlight the first appointment again, right click, choose Action, Link. This time choose New Appointment.

8. The Link window will display. In the Link Reason dropdown, select one of the options and press the OK button.

9. You will be brought back to the Appointment tab to select a new appointment type. The Person name is already defaulted with your patient's name. Select an Appointment Type, Appointment Location and fill out the remaining accept format fields.

10. Press the MOVE button and finish scheduling the appointment just as if you would any other appointment.
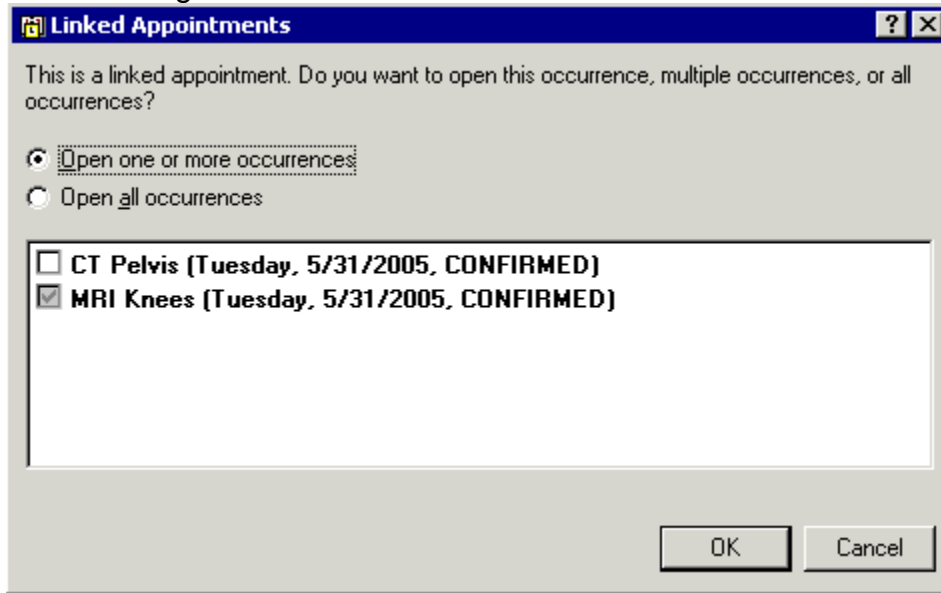
11. The appointments are now linked.
12. If you perform an action on any of the linked appointment types, you will receive a warning.

Linked Appointments

This is a linked appointment. Do you want to open this occurrence, multiple occurrences, or all occurrences?

○ Open one or more occurrences
○ Open all occurrences

☐ CT Pelvis (Tuesday, 5/31/2005, CONFIRMED)
☑ MRI Knees (Tuesday, 5/31/2005, CONFIRMED)

[OK] [Cancel]

13. This warning serves as a reminder that the appointment you are performing an action on is linked to other appointments. You can choose to perform the action only on the appointment you currently have selected, or to perform the action on all the linked appointments.

Viewing Appointment Details

In order to view specific details associated with an appointment, click the appointment inside the Appointment Book. Once that appointment is selected, select Inquiry, Appointment View from the menu. This will open the Appointment View dialog box that displays specific information associated with the appointment.
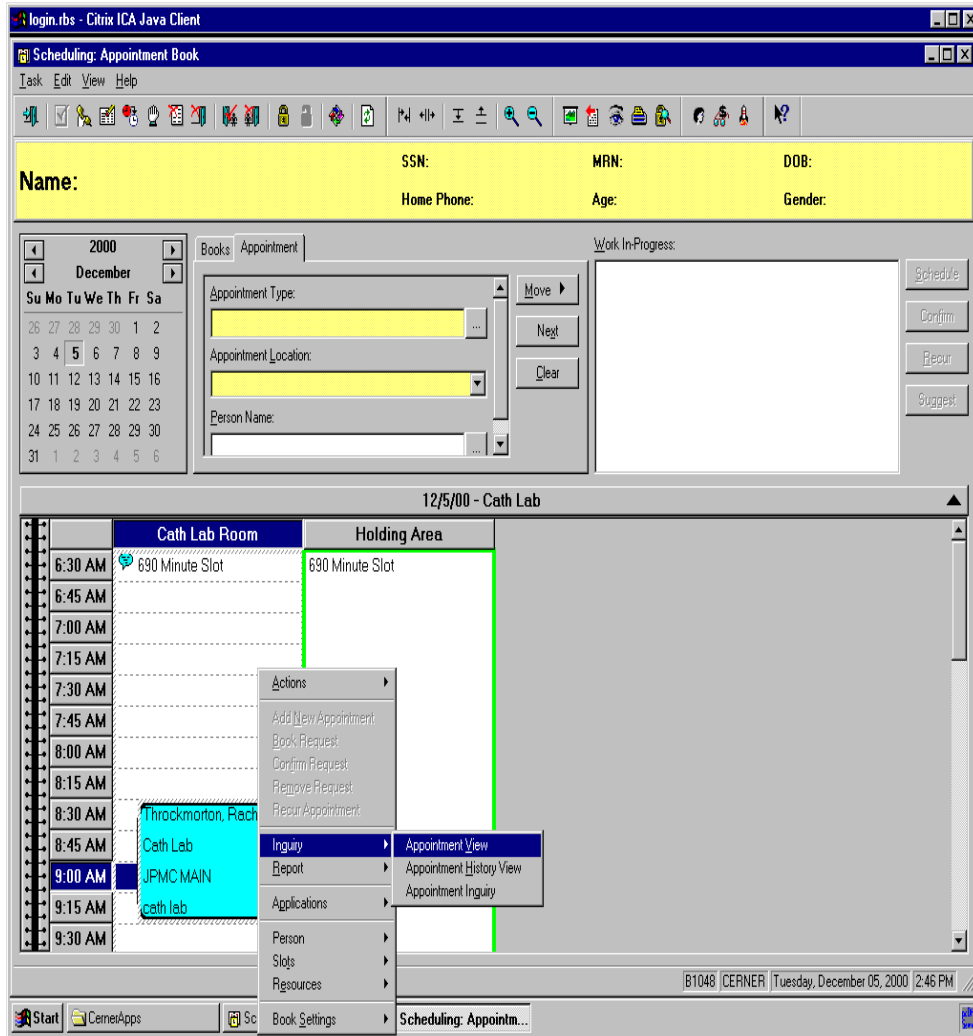
All Appointment Tab Views

General Tab View

Appointment View   ? X

| General | Event Details | Resources | Instructions | Guidelines | Scheduling Comments | Orders | Reports | Protocol Compon ◄ ► |

Appointment Information

Appointment Type: Cath Lab

Scheduled as: Cath Lab

Location: JPMC MAIN

Person Name	Encounter Type	Encounter Status	Gender	Home Phone	Business Phone	DOB
Throckmorton, Rachael R			Female	(5-7) 48--7896		12/12/70 - 12:00

Current State Information

State: Rescheduled

By: CERNER 12/5/00 2:13 PM

Details Tab View

Appointment View   ? X

| General | Event Details | Resources | Instructions | Guidelines | Scheduling Comments | Orders | Reports | Protocol Compon ◄ ► |

Field Name	Field Value	
Procedure	cath lab	
Telephone Number	405-748-7896	
Date of Birth/Age	29	
ABN		
Ordering Physician	Throckmorton, R. R	

Close

Resources Tab View

Appointment View ? X

| General | Event Details | Resources | Instructions | Guidelines | Action Comments | Scheduling ◀ ▶ |

Resource	Begin Date/Time	End Date/Time
MMC CT 1	7/13/99 8:00 AM	7/13/99 9:00 AM
Test, Beatrice V	7/13/99 8:00 AM	7/13/99 9:00 AM

Close

Instructions Tab View

Appointment View ? X

| General | Event Details | Resources | Instructions | Guidelines | Scheduling Comments | Orders | Reports | Protocol Compon ◀ ▶ |

Instruction Types:

Preparations ▼

Instructions:

NPO After Midnight
No Glucophage
Someone To Drive Patient Home
Okay To Take Medications Except Glucophage

Close

Viewing Appointment History

In order to view specific details associated with the history of an appointment, click that appointment in the Appointment Book.

Once that appointment is selected, right click the appointment, and select Inquiry, then Appointment History View from the menu. This opens the Appointment History View Box that displays specific information associated with the states that have been associated with the appointment.
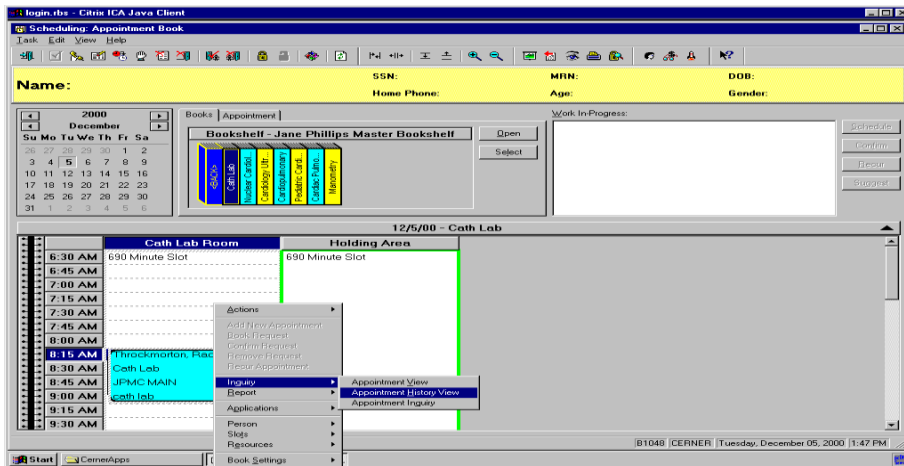

The History View Dialog Box will display.
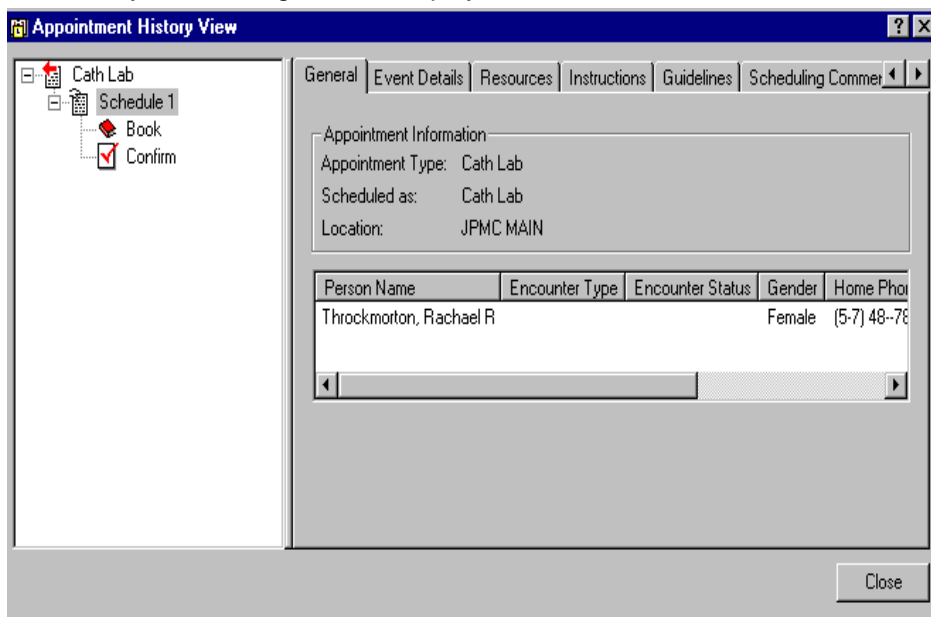
Modifying Appointment Information

There are two different types of modifications that can be made. You can modify Appointment information, which includes, ordering physician, procedure, comments, etc. You can also modify Patient information, their birth date, last name, home phone, etc.

You can modify appointment information two ways.

First, you can right click, go to Actions, and then slide your cursor down to Modify.
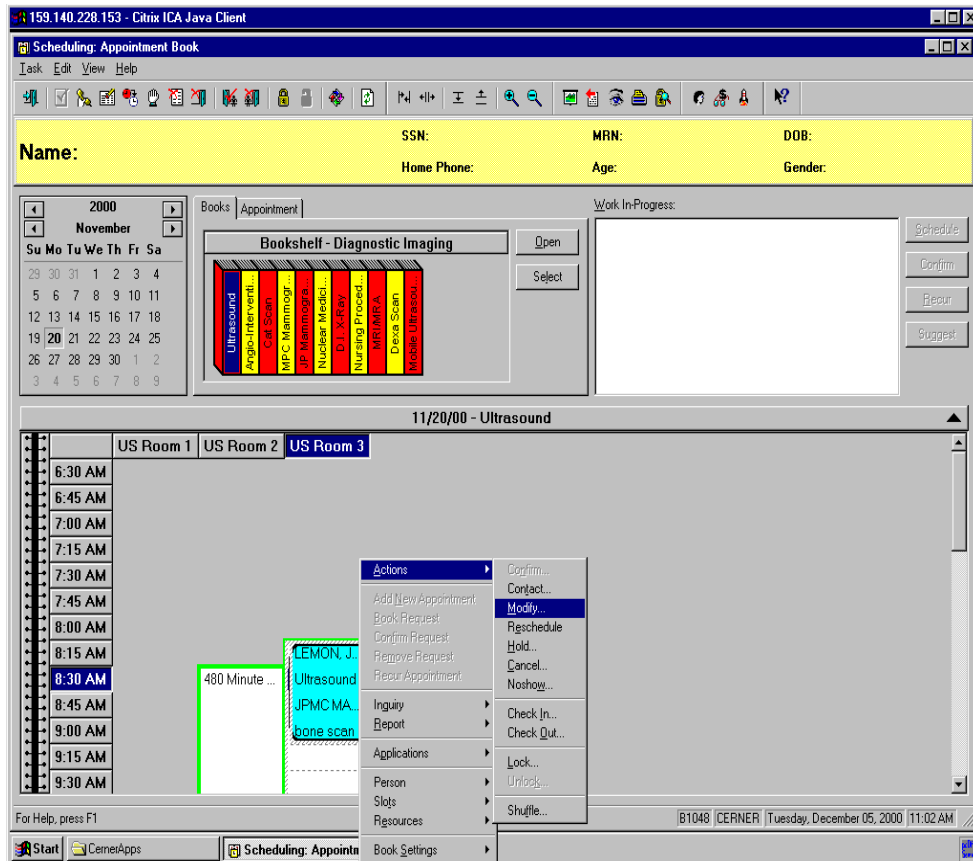
You can also highlight the appointment, and then click the Modify button ⊞ at the top of your screen.

The modify box will pop up allowing you to make any changes.

Click the Details tab to make changes to the appointment information.

You can type in any additions you need or delete information, then click OK to save.

To modify patient information, you will need to highlight that person's appointment, right click, go to Person, and then slide your cursor over to Modify Person.
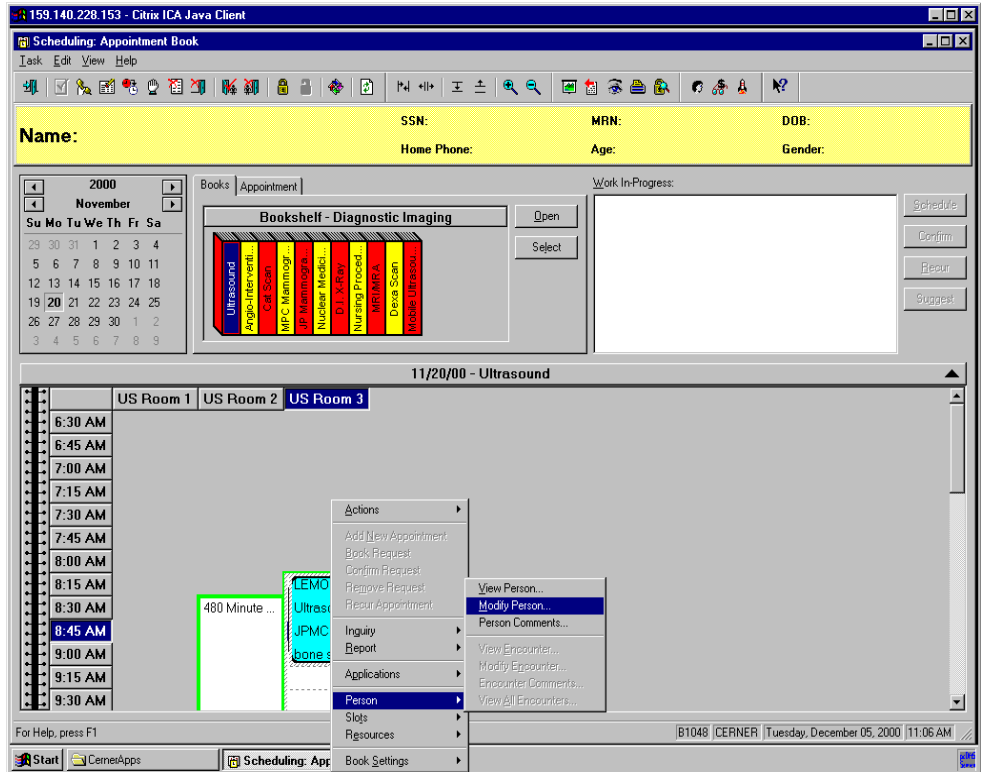
On your screen you will see the system loading patient information, and opening the modify conversation. When the Add Person window opens, you can make any changes you need.

After you have made your changes, click OK to save.

Inquiring Person and Resource Schedules

Schedule Inquiry window allows you to enter the parameters required to view the schedule associated with a specific person or resource. There are two available options for using the Schedule Inquiry window: the Person tab and the Resource tab. Each of these is described below, along with the elements that are available under each heading.

1. You can access the person and resource information two different ways. The first is to click the Inquiry button (eyeball) located at the top of your screen.

2. Another way to access the person and resource schedule is to right click somewhere on the slots, scroll down to Inquiry, and then Appointment Inquiry.
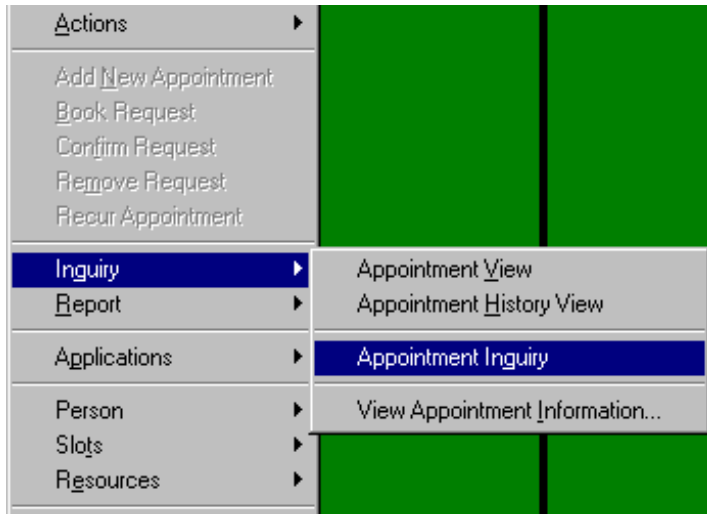
3. The Appointment Inquiry box appears on your screen.

4. To search for a person schedule, click the Person Tab.

Note: **If you are not able to see the Person Tab, click the arrows located next to the tabs.**

5. In the Person box, enter the name of the person whose schedule is to be displayed.

6. After typing in all, or part of the person's name, press the ellipse button to bring up the Person Search window. You can also hit Enter on your keyboard. The Person Search box appears on your screen.
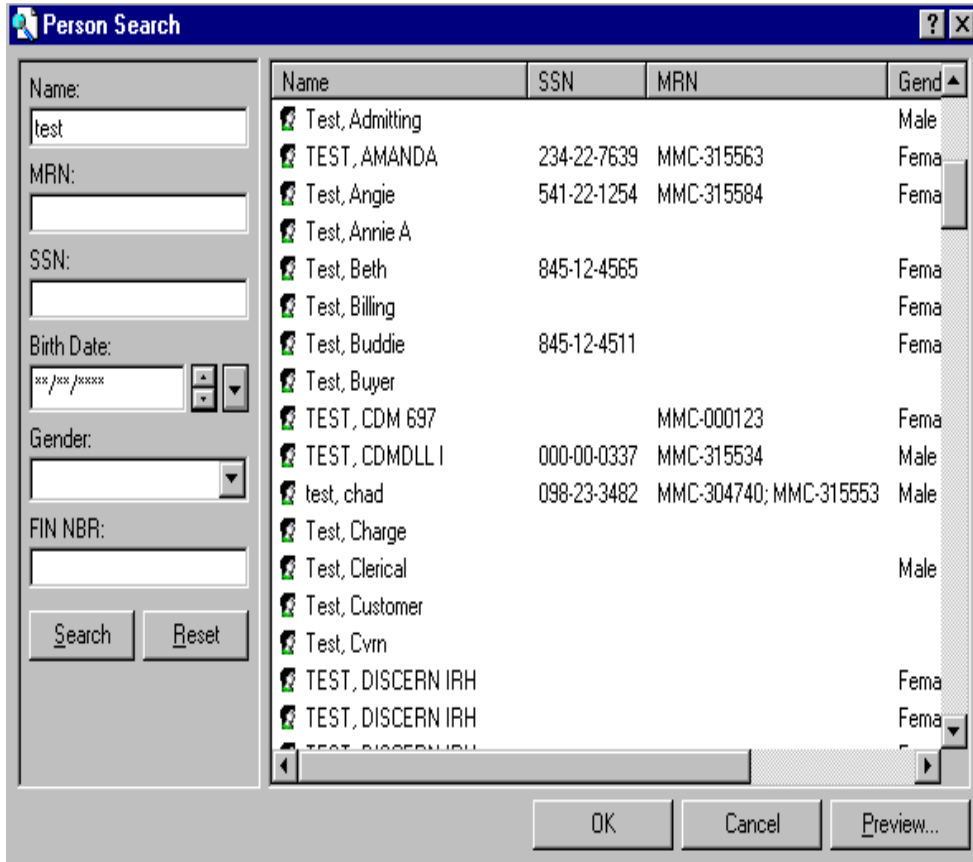

7. Find the person's name on the right, highlight it, and click OK. If you do not see the person's name, scroll up and down using the scroll arrows on the top and bottom right of the box. If the person's name still does not appear, clear the name field, type the person's social security number in the SSN field and click the Search button. You can also search by Medical Record Number, Birth date, Gender, or Fin Number.

8. After you have found your person and clicked OK, the person's name will appear in the name field. (Note: You must find the person's name through the Person Search, or the system will not be able to find the person's information.)

9. The Start Date field defaults to the date that was selected in the appointment book. If you would like to change the date on which the inquiry should begin, highlight and type over the current date or use the arrow buttons advance or go back one day at a time. You can also click the larger arrow button to bring up the calendar, and then choose your day from there. After you choose the begin time, choose an end date, or leave it blank. Begin and end times can also be chosen.


10. Once you have found the person and have chosen the begin and end times, click the Find button to bring up the person's information.
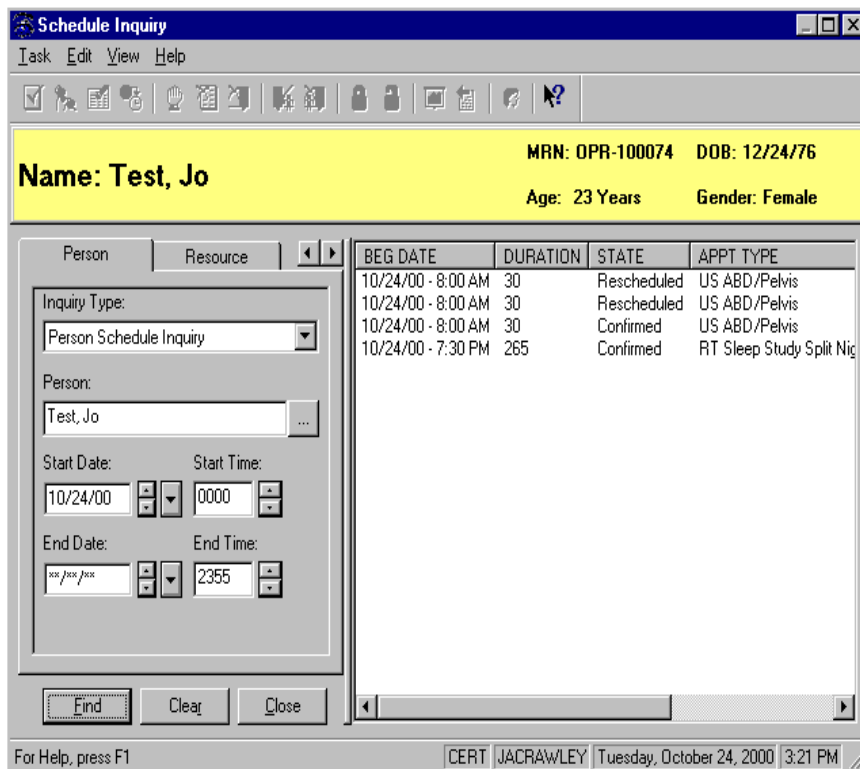
11. All appointment information for the person that falls within the parameter chosen will appear in the right hand box.

12. When you are finished with the information, click the Close button to return to the appointment book

13. To look up a Resource's information, follow the same steps as the person search to bring up the Scheduling Inquiry box and click the Resource Tab.
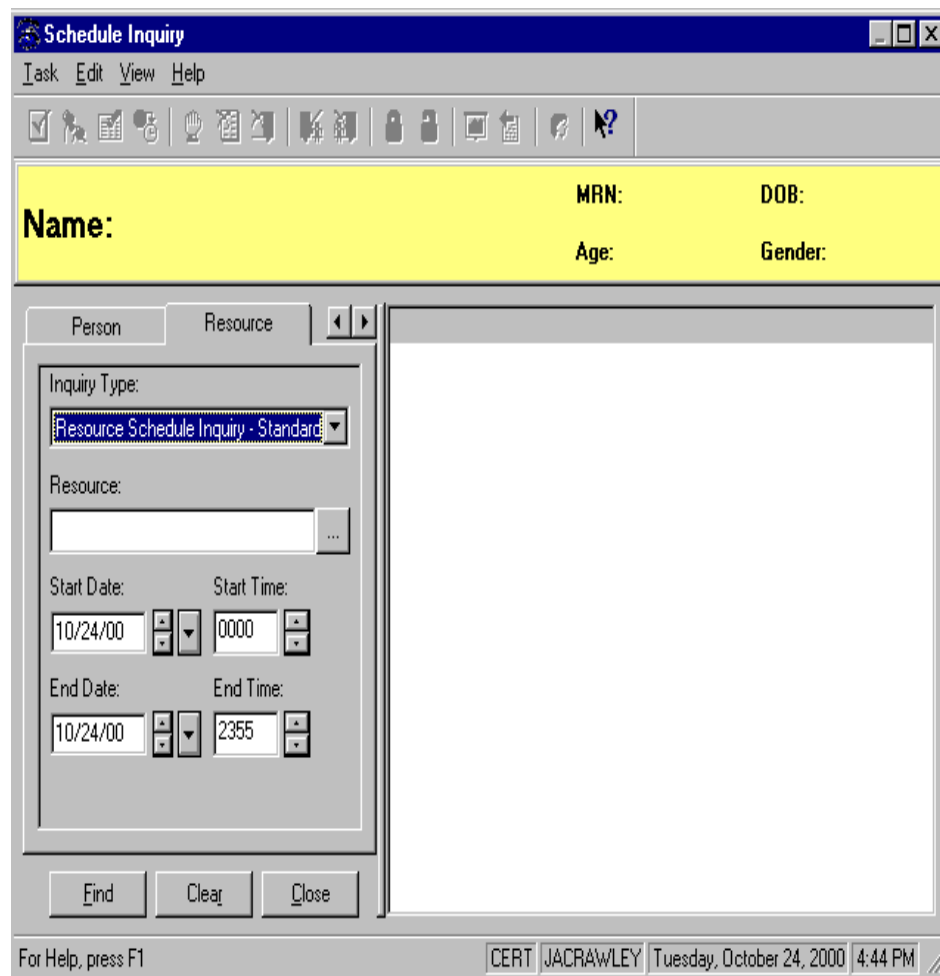
14. Type in the Resource you are searching for in the Resource field and click Enter on your keyboard. Choose the your resource from the list, then set your parameters for searching (start date, end date, etc)

15. Click the Find button and the system will bring up all appointments scheduled to that resource that falls within your search parameters.

Patient Information Chart Requests (PIR)

Overview

Use Patient Information Request to process internal requests for patient charts. Provided that your system manager has set up your system to permit batch request, you can enter requests for a set of one or more patients' charts to be sent to a common requester at a common location. For multi-patient requests, enter the requests individually to add them to a list of charts that are processed and sent in batch. You can remove a chart from the list before sending the batch request. Sending a request creates a log that reflects the name of the requester, the date of the request, and the reason for the request.

Learning Objectives

In this section you will learn how to:

- Send a Request
- Modify and Get a Request

Send a Request

1. Click the **Patient Information Request (PIR)** icon.
2. Select a facility from the **Facilities** field.

3. Type the requester's name (last name, first name) in the **Requester** field then click the **Requester Search** icon.
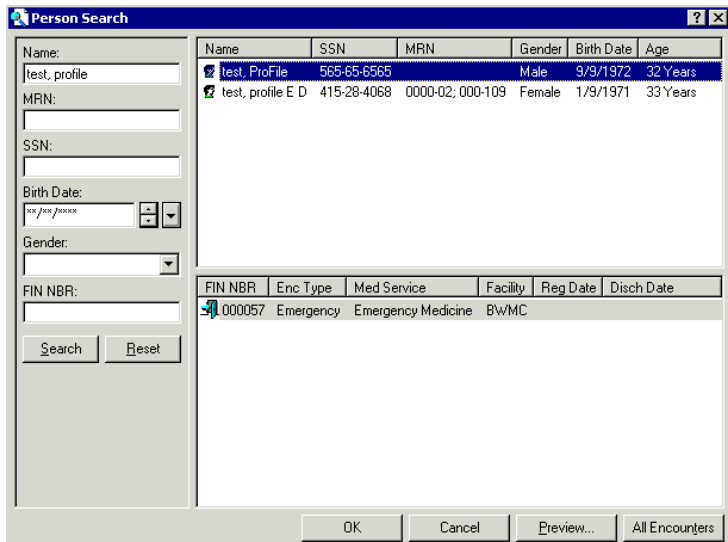4. Select the requester's name.

5. Click **OK**.
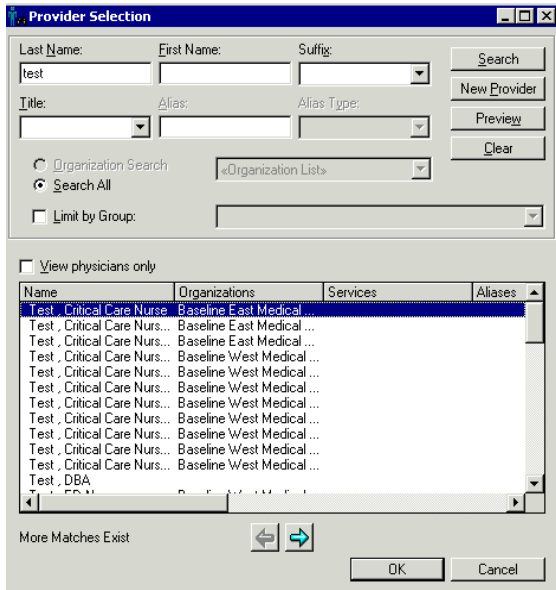
6. Type the patient's name (last name, first name) then click the **Patient Search** [icon] icon.

> **Note:** Visit lookup provides a way to look up a patient by scanning or entering a tracking ID.

7. Click the appropriate patient and encounter(s).

> **Note:** If all encounters are requested, click the box at the bottom of the screen that says All Encounters.

8. Click **OK**.

9. Click the **Requesting Location** [icon] button.

10. Click the appropriate location.

Note: **To save this location as your default click in the** ☑ Set As Default View **Box**

11. Click **OK**.
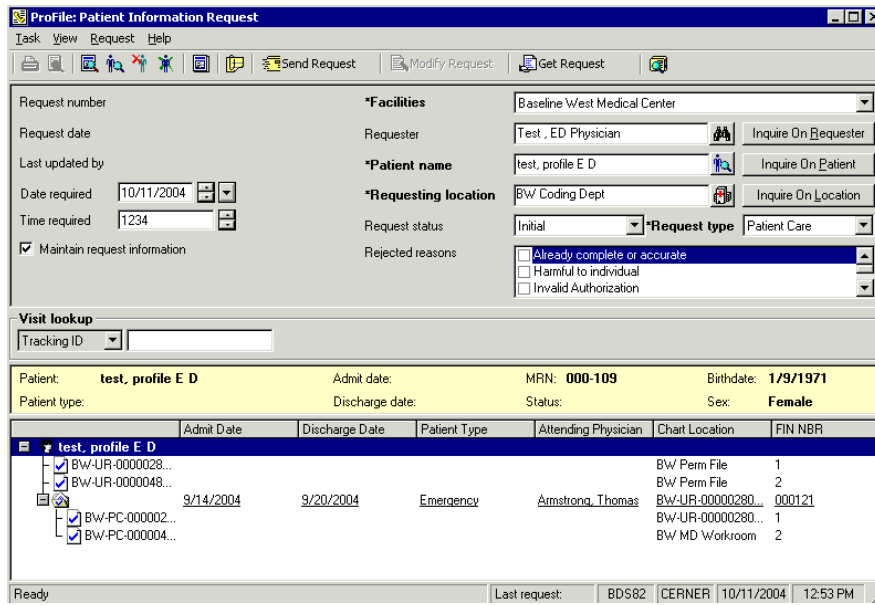

12. Select a **Request Status**.

13. Select a **Request Type**.

14. Select date/time required.

Note: If you are entering multiple requests, you can check the Maintain Request Information box which will hold the requesting location and requester for you.
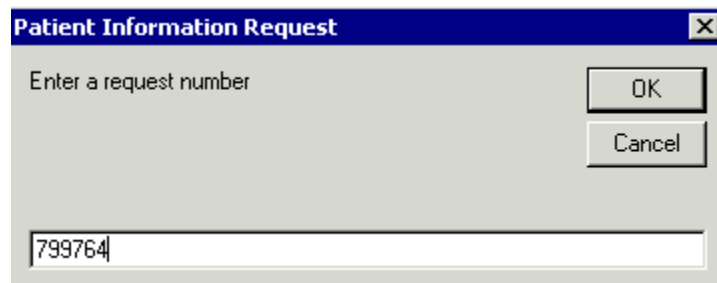
15. Click the **Send Request** icon.

16. The note form opens, enter a note or click **Exit** .

Retrieve and Modify a Request

1. Click the **Get Request** icon.
2. Type a **request number.**

Note: The last request number can be found on the bottom of the screen.

3. Make necessary changes.
4. Click **Modify Request** to save the changes.

5. The note form opens, enter a note or click Exit

Locks

Sometimes a slot will become locked when a user has tried to schedule an appointment to the slot, but for whatever reason it did not finish booking. The slot may appear open, but it will not allow you to book an appointment. If you get a warning that a slot is locked, look to see whom it was created by, then have that person unlock the slot.
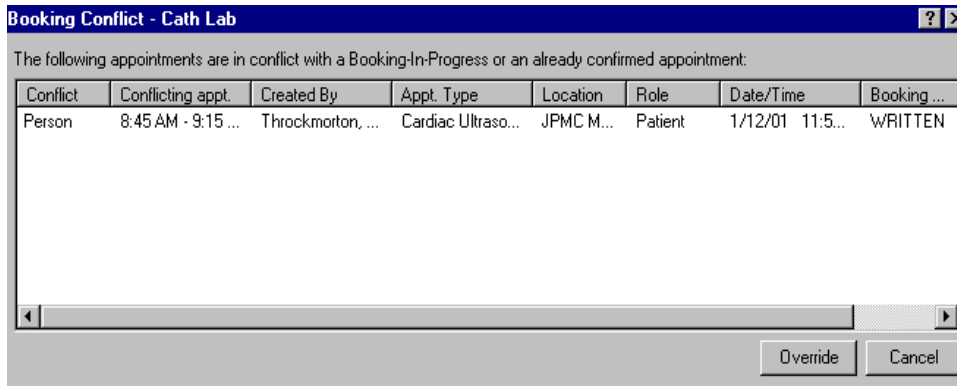
1. Locate the lock by clicking the View Locks icon 🔒. A window will display listing all locks created by the username you are signed onto the application with.
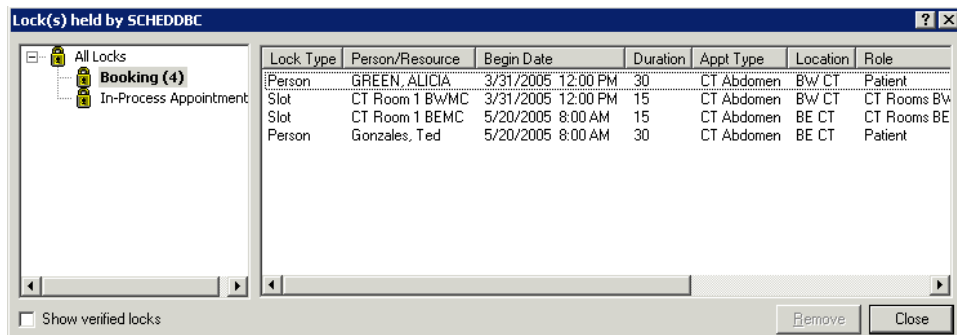

2. Click Booking to see if the slot was a booking lock. If there are locks which you would like to remove, highlight them and press the REMOVE button.

3. If you don't see a lock in Booking, click In-Progress Appointments to see if there is a lock in there. Highlight any In Progress locks and press the REMOVE button.

4. You may also need to release any verified locks. To Accomplish this, click the checkbox next to Show Verified Locks in the bottom left corner of the window.

Blocking Schedules

There are times when you will need to block off a schedule so that appointments are not scheduled. There are two ways to block schedules.

To block just a few slots, you can use the appointment type Block appointments. You can schedule this just like regular appointments. When you have confirmed it, the slot will be RED and cannot be scheduled to. To cancel a blocked appointment you can just R click on the appointment and go to actions and then cancel and this will cancel the blocked appointment if needed.
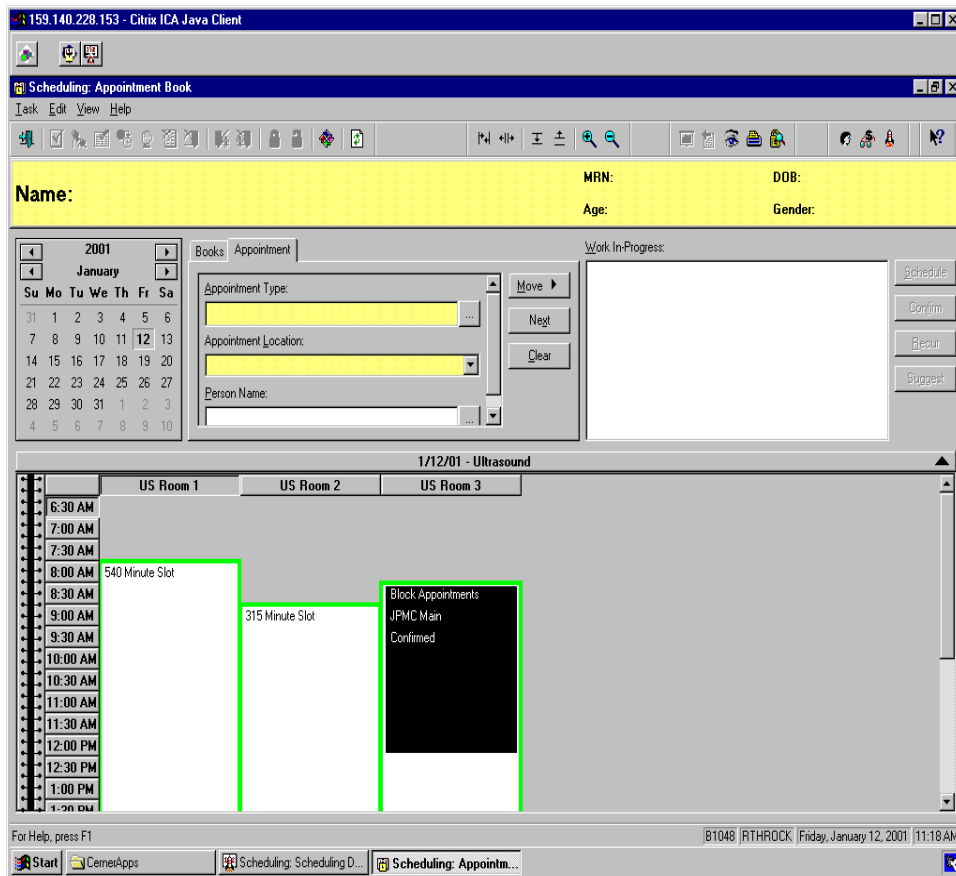
If you need an entire day or more blocked, the Block Out appointment type may be too cumbersome. Instead you can delete the slots that you want blocked, and add in blocked slots.

To delete a slot, right click the slot, move your cursor to Slots, then Remove Slots.

Note: **To remove more than one slot at a time, left click each while holding down your CTRL key, then right click to remove.**
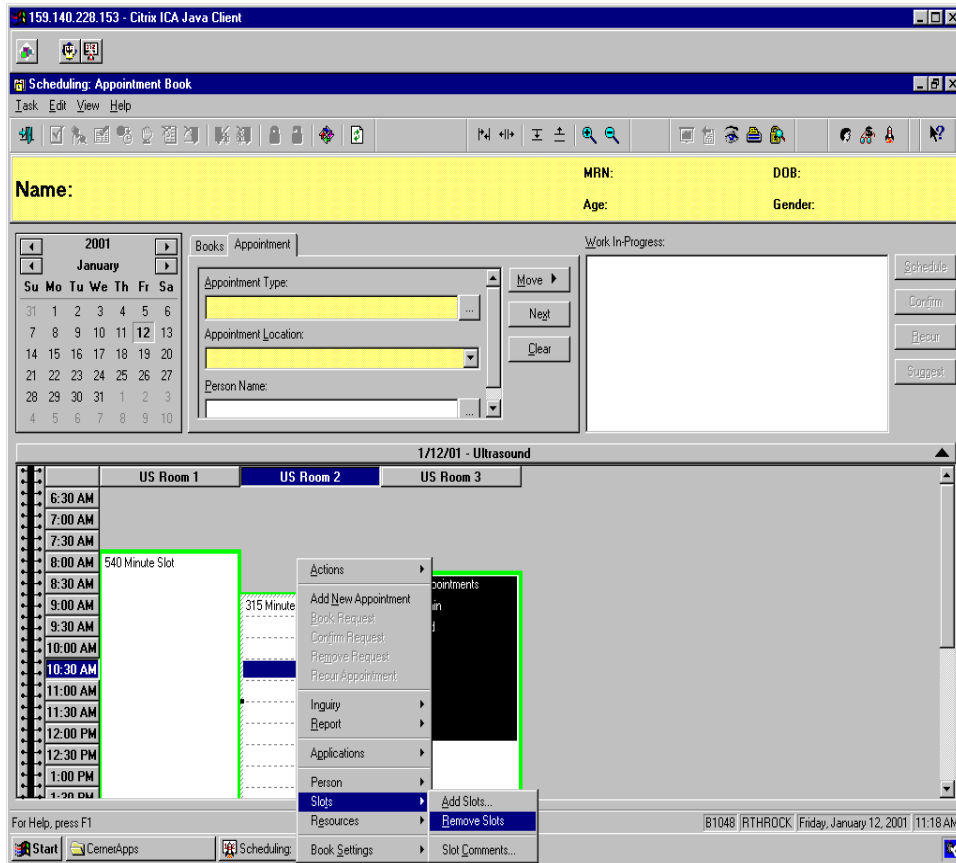
The system will ask you if you're sure you want to remove them. Click Yes.
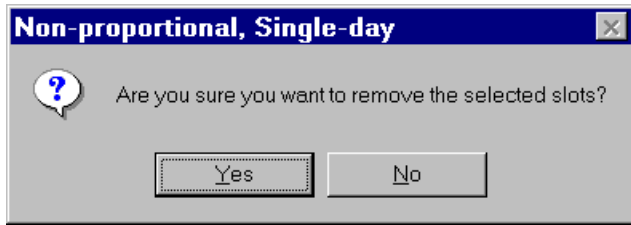
Once you have removed all the slots that you want to replace, click the resource whose slots you are adding to, then right click. Move your cursor to Slots, then Add Slots.
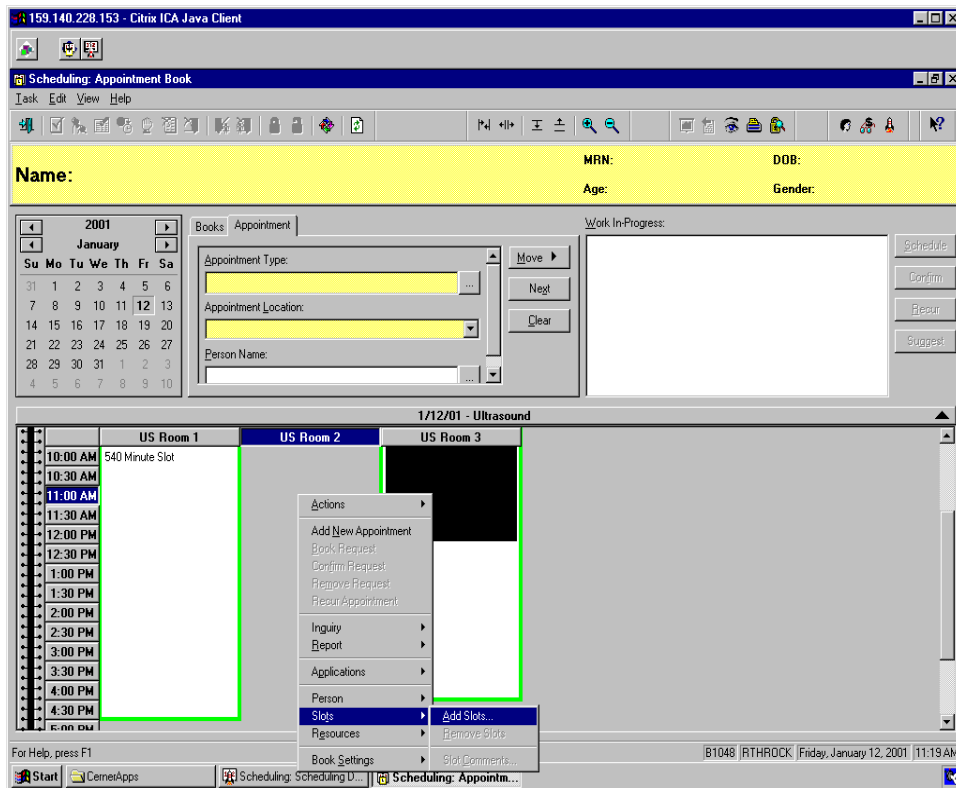
You will need to put in the time that you want the slots to start, and end. The time interval defaults to 30 min, you can change it by using the drop down box.

Then you will need to select the slot you want to use. Click the plus + sign next to All Slot Types.
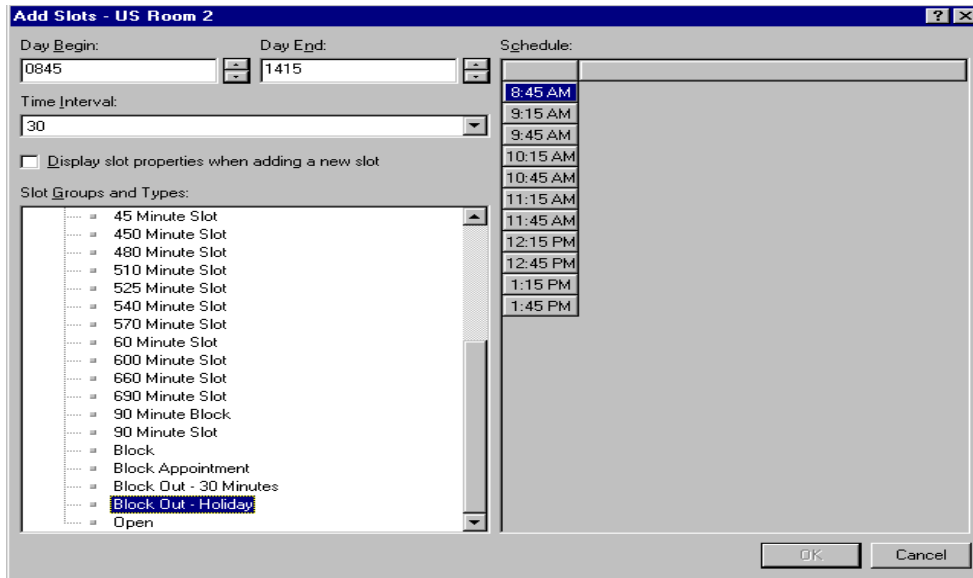
Click the Block slot you want to use, (try to use either Block Appointments or Block Out – 30 Minutes), then drag it over to the time of the right side of the window.
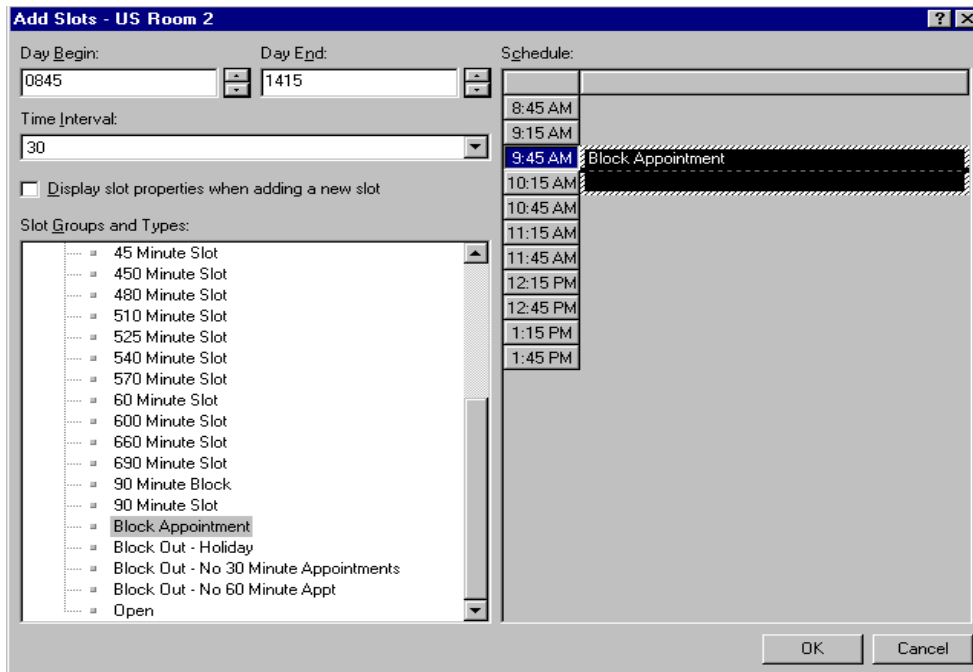
Click OK and the slot has been added.

Request List(Wait List)

When an order is placed in Powerchart, and a Request List Queue has been set-up, the scheduler will be able to look at the Request List to see what appointments need to be scheduled.

1. From Powerchart, select a patient using the person seach [icon] icon. Select the correct in-patient encounter.

2. From the Order Tab in Powerchart, place an order.

3. Sign the order, using the [icon] icon . Click the [As Of 4:51 AM] to refresh the screen. Ensure that the order is now in "ordered" status.

4. In the Scheduling Appointment Book application, select the Request List Inquiry icon [icon]. This will open the Queue window.

5. Select Queue only from the first drop down box, and the appropriate queue from the second drop down box on the left side of the window.
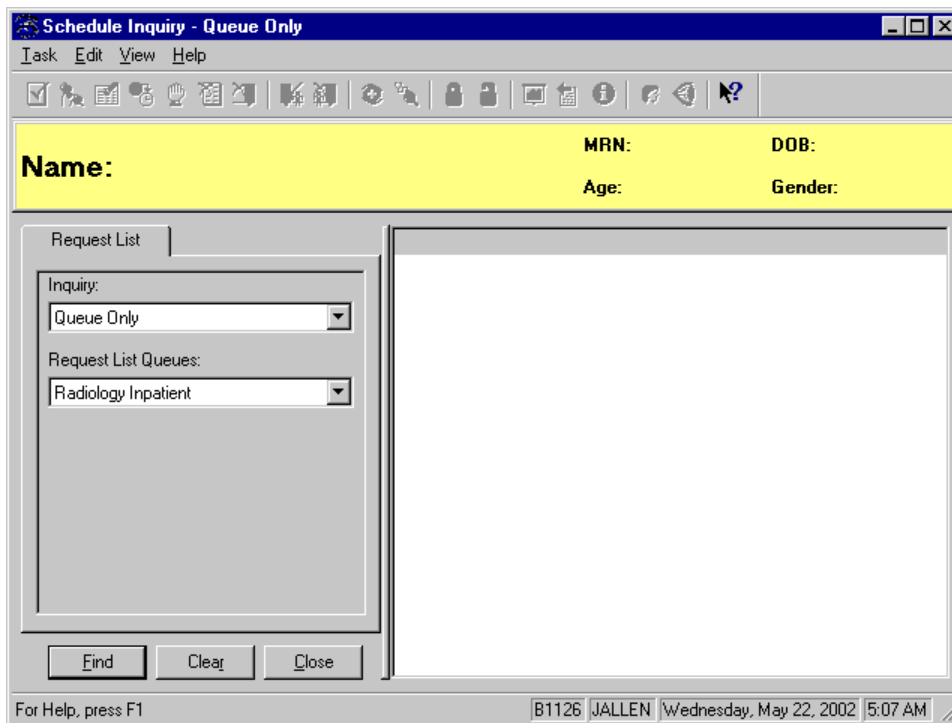
6. Click "Find". This will bring up a listing on the right side of all the orders that have been placed in Powerchart that need to be scheduled that meet the requirements set in the request list.
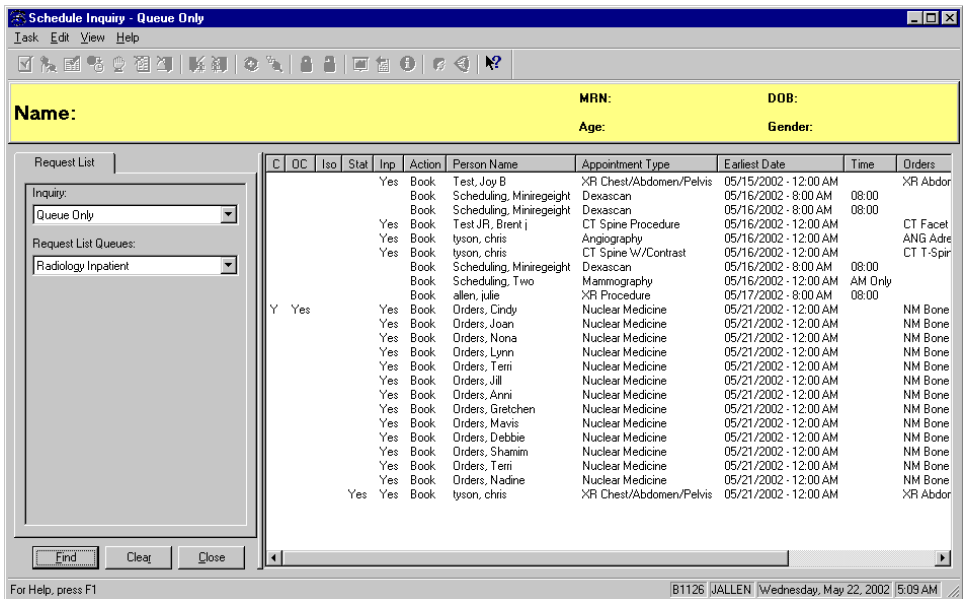
7. Select the Person that will be scheduled, then right-click to bring up the option menu.
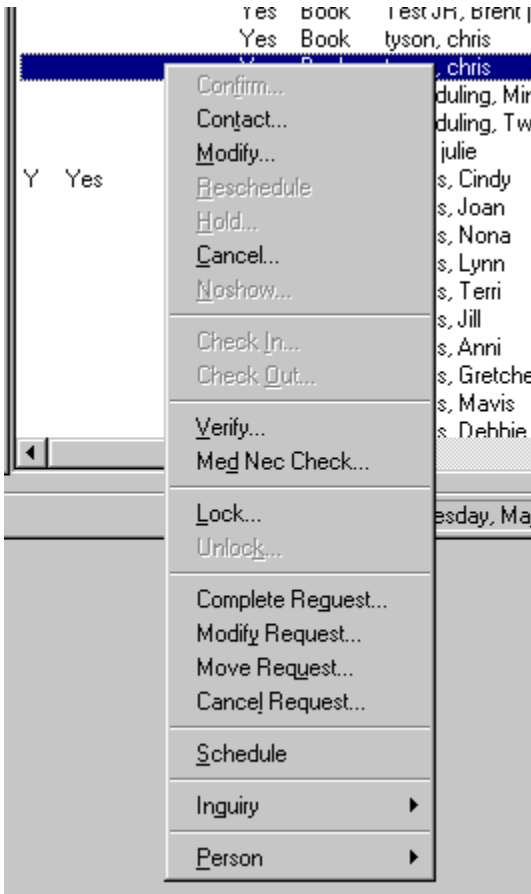
8. To schedule to requested appointment, click Schedule. This will bring up Appointment Attributes Window. Complete any required fields from the Scheduling Accept Format. Click Ok.
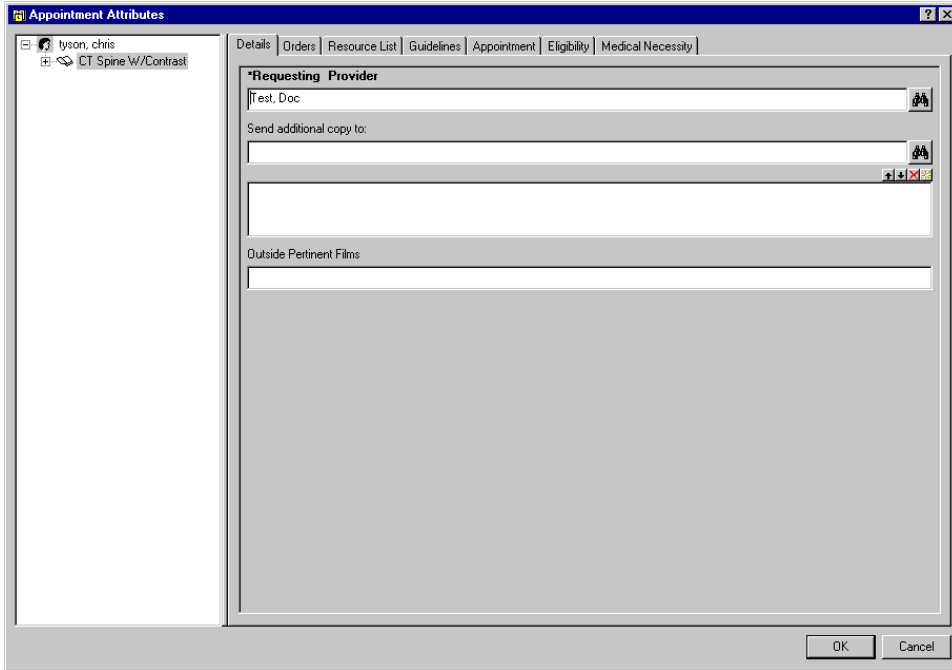
9. This will place the appointment information into the Work in-progress box. Complete the appointment as normal.
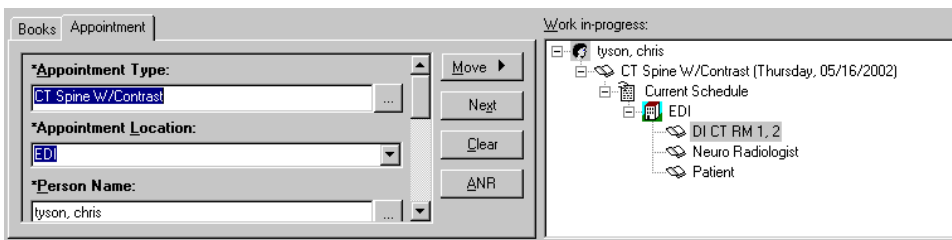
Requests and Inserts

REQUEST For Wait List – No Show
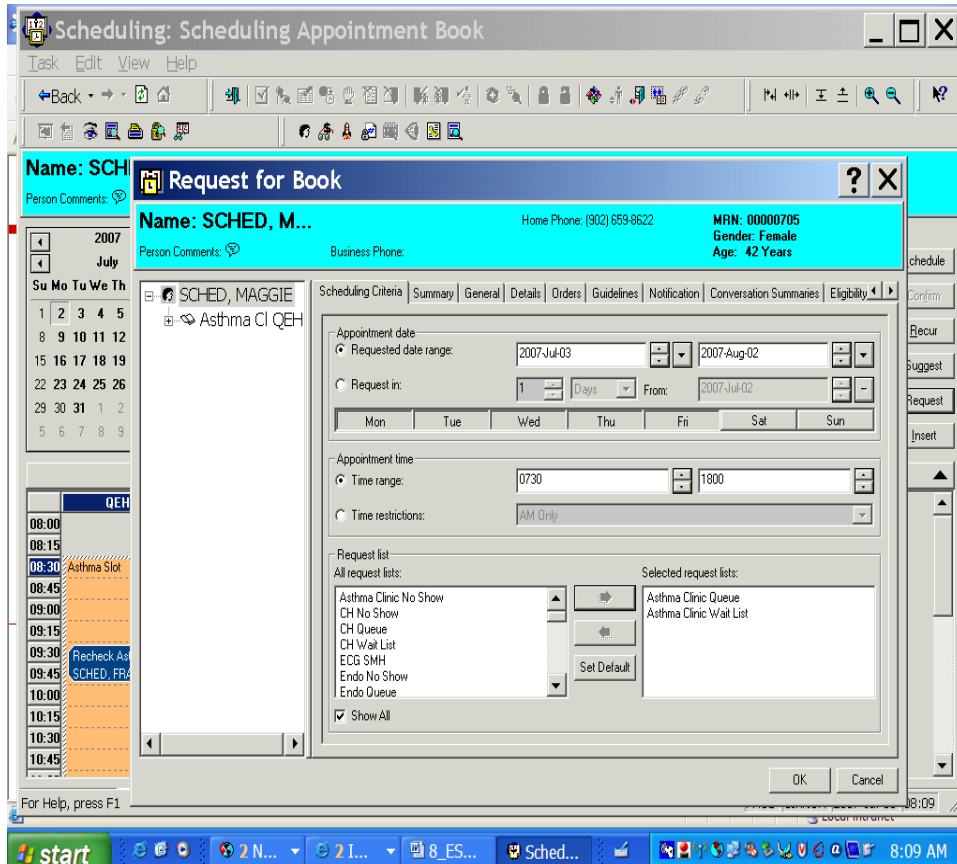
Request button to the side of the WIP is for putting a patient on the wait list or the no show list or checking on a queue coming over from power chart.

Go to appointment tab and fill out the information in the accept format the appointment type, location, person and all required fields. Move this information over to the Work In Progress. Click on "REQUEST TAB" information box will populate you can choose date, time, day range. Tab to Request list box and choose from the field the department and pick wait list or no show from the field and double click and move or use arrows and this will populate in the "Selected request list. Click OK

When time comes available go to the "Schedule inquiry eye" or "Request list Queue" choose the department and the wait list or no show list click find , highlight the person in the box where the information populates and R click and go to Complete request or Schedule and complete information of date and time.
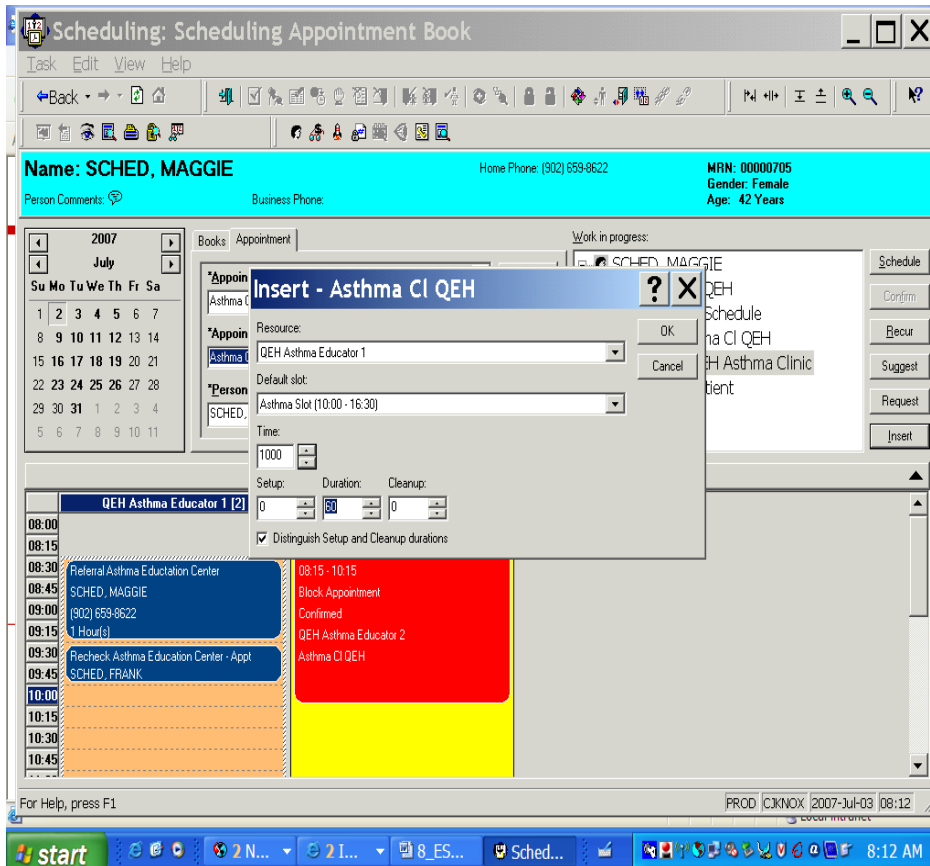
Fill out required information in the accept format and move to WIP this will be used if an appointment for example is booked at 0730 and you want to put another appointment at that time you can Click the tab INSERT and the Insert box will populate put in the time required and click ok and the appointment will either appear beside or move the previous appointment down. Click confirm and fill out the required information.

Printing Reports

To Print Reports from the Scheduling Appointment Book, follow the steps below:

1. Click on the Appointment Reports Icon in the tool bar:
2. The Screen Below will appear:
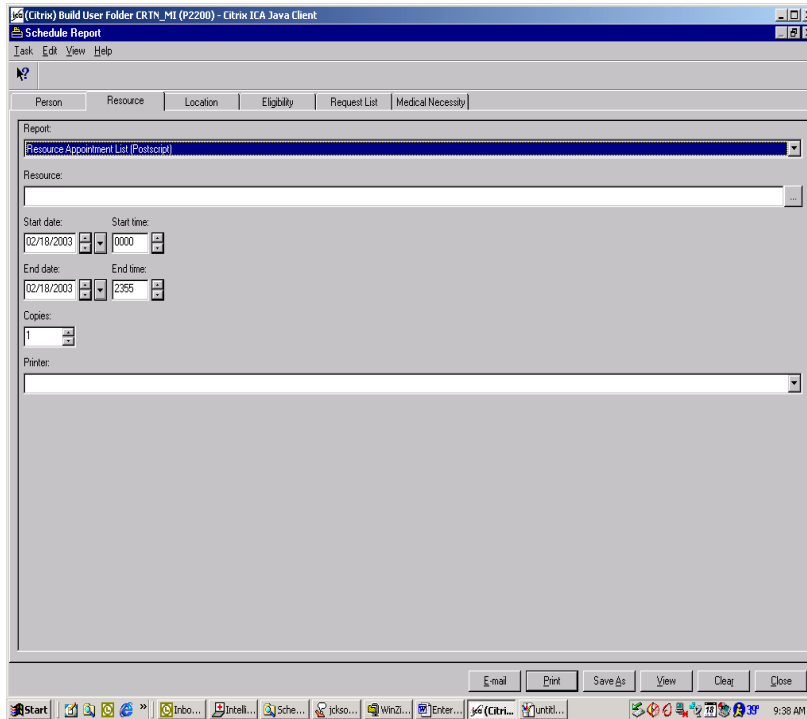
3. Select the appropriate tab (Person, Resource and Location are most often used)
4. Select the desired report from the drop down box.
5. Set filters of resource, person or location.
6. If appropriate, set start and end date of report.
7. Select the number of copies to print
8. Select printer from drop down box.

Hint: To default printer in all screens, right click on printer in box and click "Set as Default." This will stick for the time that the user is logged onto the application.

Adding Comments

Slot Comments:
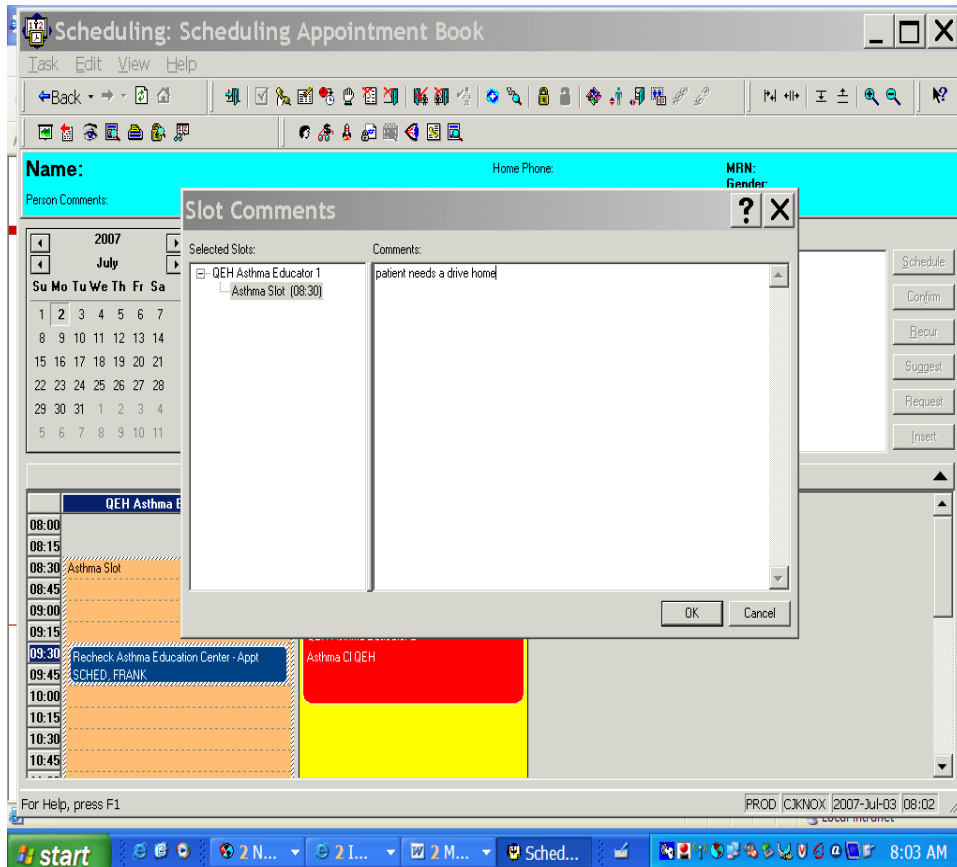
Highlight the slot you wish to put the comment on. R click and highlight slots and pick slot comments and the slot comments box populates. Fill in required information in the comment field , click OK .

To check on the comment in the slot if you have the icon checked in the book settings under properties and in the icon tab there will be a blue bubble on the top of the slot, click on the icon and the information about the slot will open. Or you can R click slot and slot comments.

Resource Comments
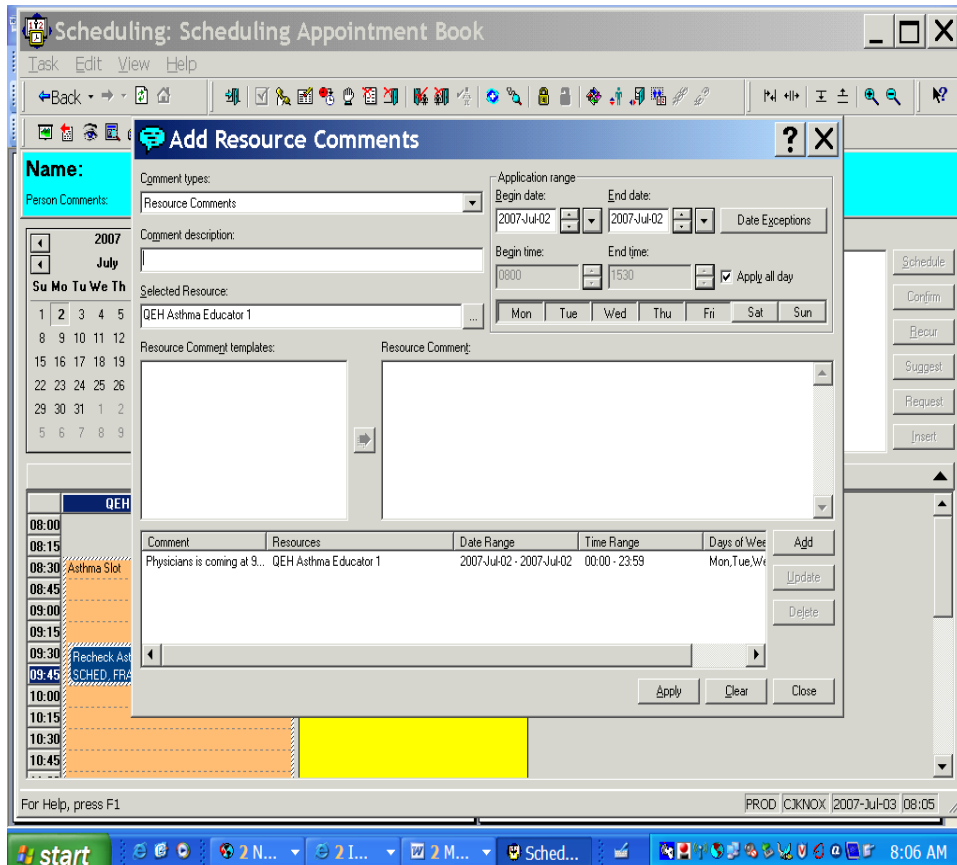
Click on the resource in the appointment book or R click resource and highlight resource and click "Add Resource Comment , In the comment box put in the information in the description (what I do after I enter the info in the description field I just copy and paste in the resource comments box) Click add and Click apply and then close. Putting in the information concerning that resource the icon (blue bubble) will appear on the resource in the appointment book.
To check on the resource comment that was made, just click on the icon and the information box will populate with comment. Or you can R click go to Resource and view resource comments and comments will populate.

Person Comments:
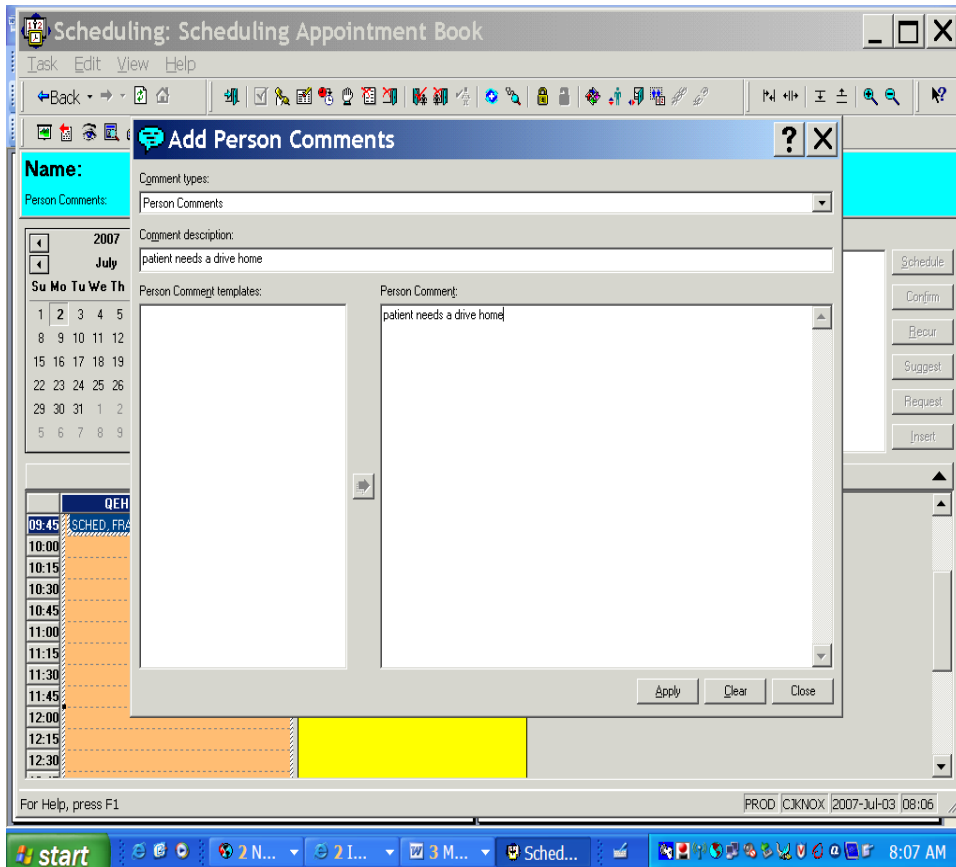
Click on appointment in appointment book R click go to person and then person comments and click "ADD" fill in comment box in comment description and copy and paste and put in Person Comment field click apply and close.

To see a comment for the person, click appointment , R click and go to person comments it will show what was said. If the name of person is in the demographic bar the bubble will appear and you can click on the icon and the information that was put in will populate. (you have to have the icon checked in the book settings.)

Contact Comments:

	Contact - Records the date and time of any contact made with the person scheduled for the appointment, as well as allowing you a place to enter any applicable comments concerning the contact. For example, if you call the person to remind them of the upcoming appointment, you could document the contact in the Contact dialog box.

Click the icon "Contact" in the toolbar or R click on the appointment and highlight Contact , the Contact box populates you can just put the date which default in or put a message in the comment field. Click OK

To view this you go to the Icon "Appointment View" or R click on the Appointment and go to "Inquiry" and Appointment View and click on the Tab "Action History" or "Action Details" it will show the date of contact. Or the same as above but go to Appointment History View and to the Tab" Action History" and it will show time of contact.

CR is Down

Process when CR is Down:
When the CR is Down -

If you click YES, the following message appears.
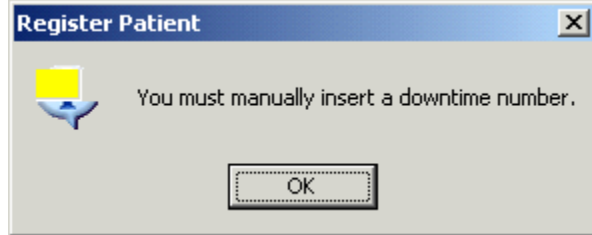
1. Click OK, The Cursor will return to the MRN field (White in color see below).
2. Hold down on the CTRL key and hit the Insert Key
   A number will populate the MRN field from the alias pool
3. Click OK

Process when a number is mistakenly not Assigned:
User, clicks on the "Add Person " button, to carry out a Registration but mistakenly does not use the "Search for Person Icon to obtain a new MRN/PHN.

1. The following message will appear when you click OK to complete your registration.
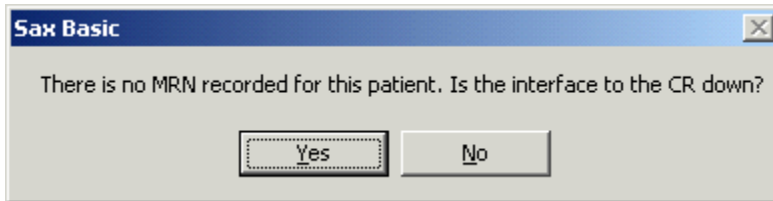
2. IF you Click NO (Twice) a message presents below:

3. When You click OK, the message closes.
4. Carry out the process of getting a number from the CR by clicking on the " Search for Person Icon (with the green checkmark) top left hand corner.
5. Continue steps of assigning new number.
6. Complete the registration.